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Office of Trade
U.S. Customs and Border Protection

ACE Reports Workshop – Import Session

WESCCON Conference 2019



October 11, 2019



U.S. Customs and
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ACE Reports News on CBP.gov

Official website of the Department of Homeland Security



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Priority Trade Issues

Rulings and Legal Decisions

Stakeholder Engagement

Trade Facilitation and Trade Enforcement Act

ACE and Automated Systems

The Automated Commercial Environment (ACE) is the system through which the trade community reports imports and exports and the government determines admissibility.

Please visit the [ACE Transaction Details](#) page for full details on ACE transmission requirements.



ABOUT ACE	TRAINING & SUPPORT	TECHNICAL INFO
ACE features	Guides and videos	Programming documentation and Implementation Guides
Get started	Outreach events and webinars	
ACE Portal Overview	FAQs	
Get Email Updates	Support Resources	

What's New with ACE

ACE Reports:

- CBP Announces a New Data Initiative

Providing access to the most up-to-date trade data, in a timely manner, is a business imperative for CBP. To this end, we'd like to remind the trade community of an initiative that is underway to make trade data more accessible to ACE users. The initiative is comprised of three projects aimed at providing more powerful reporting tools and expanded access to data for the trade community.

For additional information on the initiative, please view this [video](#)

- [Transition of Importer Trade Activity Data to ACE Reports](#)
- [Updates to Reports Capabilities \(March 2019\)](#)

Get Started with ACE

- [Get Started](#)
- [Apply for an Account](#)
- [Login](#)

How to Stay Informed

- [Sign up for CSMS](#)
- [Outreach Events](#)
- [Learn about the Trade Support Network \(TSN\)](#)

How to Get Support

- [ACE Support](#)
- [ACE Availability Dashboard](#)
- [ACE Training](#)
- [FAQs](#)



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[Data Initiative Video](#)



ACE Reports Information Notice Updates

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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.



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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

Non-ISA members pay \$250+

Wait 3-6 weeks for reports

Information mailed on CDs



What's Coming:

Gathering import data through ACE Reports


Reports available free in ACE

Run reports on demand

Access through ACE Reports







Need Help with ACE Reports?



ACE Reports Office Hours

Got Reports Questions? We've Got Answers.
Schedule a Virtual Office Hours appointment with an ACE Reports expert and get help with your specific questions!

Office Hours Session Details

	When? Every Tuesday 15 or 30 minute appointments between: <ul style="list-style-type: none">• 7:00AM - 9:00AM ET• 11:00AM - 2:00PM ET
	Who? All ACE Reports Users <ul style="list-style-type: none">• Connect with an ACE Reports Expert• 1:1 Appointments
	How? Send Us An Email <ul style="list-style-type: none">• Send an appointment request to ace.reports@cbp.dhs.gov• Please include the following:<ul style="list-style-type: none">• "Request for Virtual Office Hours Appointment" in the subject line• A brief description of your question/issue
	Where? Attend Office Hours Virtually <ul style="list-style-type: none">• Once an appointment is scheduled, a meeting invite will be provided with a link to attend a virtual meeting room• Telephone discussion

Have you checked out the ACE Reports resources online? Before requesting an office hours appointment, be sure to review these videos for helpful ACE Reports information:

- ACE Reports Training Videos - <https://www.cbp.gov/trade/ace/training-and-reference-guides#reports>
- ACE Reports Webinar for the Trade - <https://www.cbp.gov/trade/ace/upcoming-ace-outreach-events-trade>



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](#)



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<https://www.cbp.gov/trade/ace/training-and-reference-guides#reports>



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



How to Get Support



ACE Support



ACE Availability
Dashboard



ACE Training




FAQs

Discussion on ACE Reports



ACE Reports Home Tab – Updates and Tips Panel

 U.S. Customs and Border Protection



Welcome: **JE727770** | [Applications](#) | [Preferences](#) | [Help menu](#) | [Log off](#)

Home | Documents

ACE REPORTS

Role: **Broker** | Account ID: **0005676506**

Search Workspaces:

Available Workspaces	Info
Trade	
Broker	
Training	
Training	



Updates


08/16/2019 - Updated PGA-101 report now available
08/16/2019 - ITRAC Exam Details report now available to Importers and Brokers
08/16/2019 - New report titled REF-003 PGA HTS Code Jurisdiction now available
08/16/2019 - REF-001 report updated and renamed to PGA HTS Flags and Program Codes now available
06/04/2019 - Retirement of ESM-10002 universe scheduled for June 20, 2019
06/04/2019 - Remodeled PGA Message Set universe now available
06/04/2019 - PGA Message Set - Cargo universe is scheduled for retirement on June 20, 2019
06/04/2019 - Collection/Payment Date data element now available in Entry Summary universe
06/04/2019 - Consolidated Express Filing Indicator now available in Entry Summary universe
06/04/2019 - ES-704 TIB Closure report now available in Liquidation universe
04/18/2019 - Updated Cargo Release universe with additional data elements now available under Cargo Release New tab
04/18/2019 - ITRAC workspace and reports now available to Importers and Brokers
04/18/2019 - Bond universe and REV-001 report now available to Importers and Sureties


Tips


Scheduling a Report

To schedule a report, once you've set up your query parameters in the **Query Panel**, select the button in the top-right for **Close** and then choose **Apply Changes and Close** (Note: This will cause any data already returned by the report to be cleared out). Save a copy of the report in your personal folder, then go to the **Documents** tab, right click the saved report and select **Schedule**. For quick overview, watch: [ACE Reports Video 11 - Scheduling a Recurring Report \(Caption File\)](#)

 Create Ad Hoc Report

 View ACE Reports Training Resources

 **Need Assistance?** The ACE Reports team can be reached at ace.reports@cbp.dhs.gov

 U.S. Customs and Border Protection

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ACE Reports Preferences (Settings)

Preferences – JE727770

General

☐ Use Default Settings (Administrator defined)

Set BI launch pad start page:

☒ Home tab

☐ Default Home tab

☒ Select Home tab:

☐ Documents tab

☐ My Documents

☒ My Favorites

☐ My Inbox

☒ Folders

☒ Public Folders

☐ Select Public Folder:

Choose Columns to Display on Documents Tab:

☒ Type

☒ Last Run

☒ Instances

☒ Description

☒ Created By

☒ Created On

☒ Location (Categories)

☒ Received On (Inbox)

☒ From (Inbox)

Set document viewing location:

☒ In the BI launch pad portal as tabs

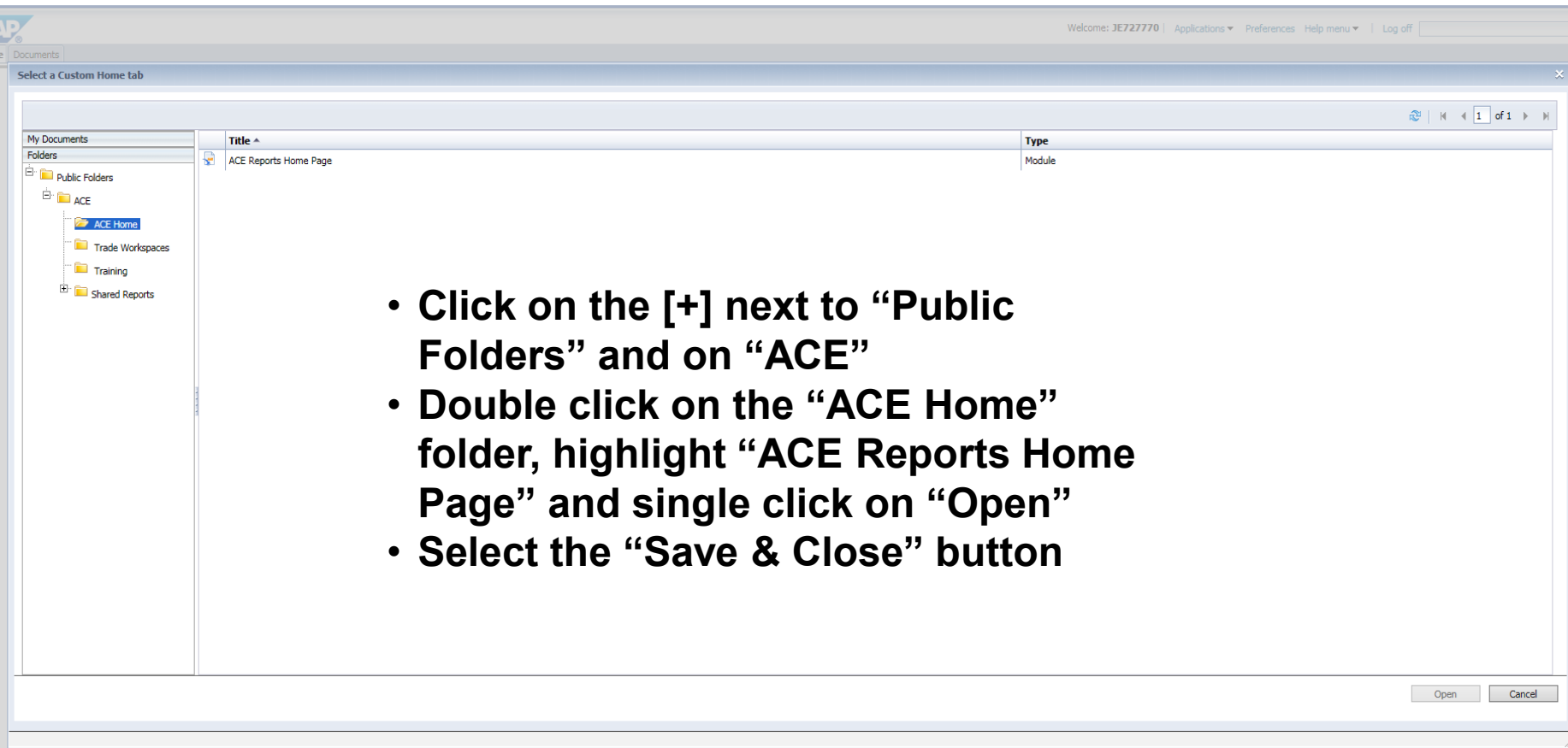
☐ In multiple full screen browser windows, one window for each document

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



My Documents

Folders

- Public Folders
 - ACE
 - ACE Home**
 - Trade Workspaces
 - Training
 - Shared Reports

Title	Type
ACE Reports Home Page	Module

Open Cancel

- 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

Preferences – JE727770

Preferences

- General
- Change Enterprise Password
- Locales and Time Zone
- Analysis edition for OLAP
- Web Intelligence**
- BI workspaces
- Crystal Reports

Web Intelligence

View

☒ HTML (no download required)
☐ Applet (download required)
☐ Desktop (Rich Client, Windows only, installation required)
☐ PDF

Modify (creating, editing and analyzing documents):
This is also the interface launched from the Go To list or My Applications shortcut.

☒ HTML (no download required)
☐ Applet (download required)
☐ Desktop (Rich Client, Windows only, installation required)

Select a default universe:
No default universe [Browse...](#)

When viewing a document:

☐ Use the document locale to format the data
☒ Use my preferred viewing locale to format the data

Drill options:

☐ Prompt when drill requires additional data
☐ Synchronize drill on report blocks
☐ Hide Drill toolbar on startup

Start drill session:

☐ On duplicate report
☒ On existing report

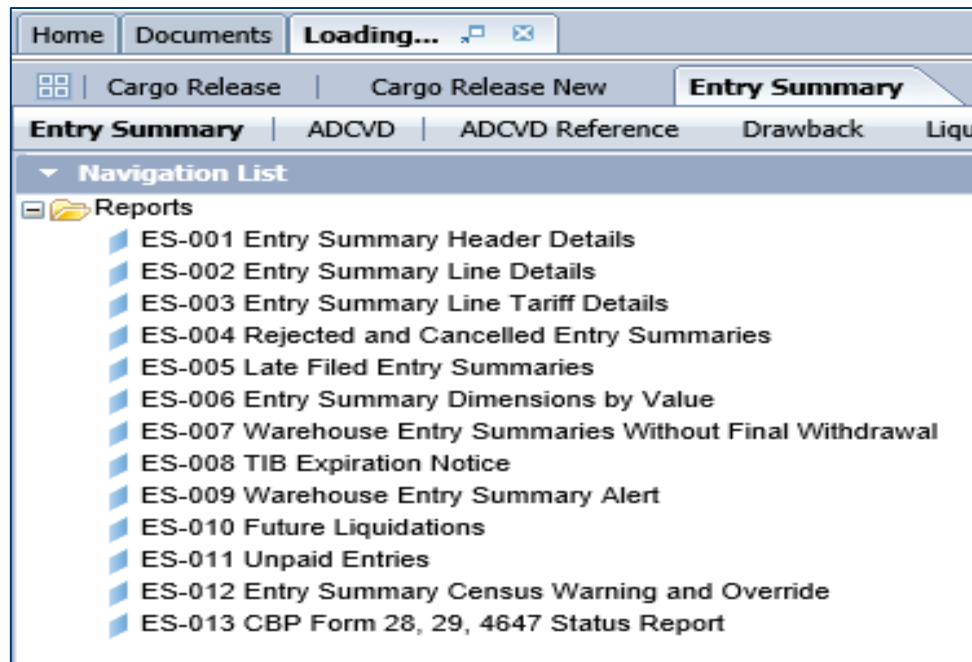
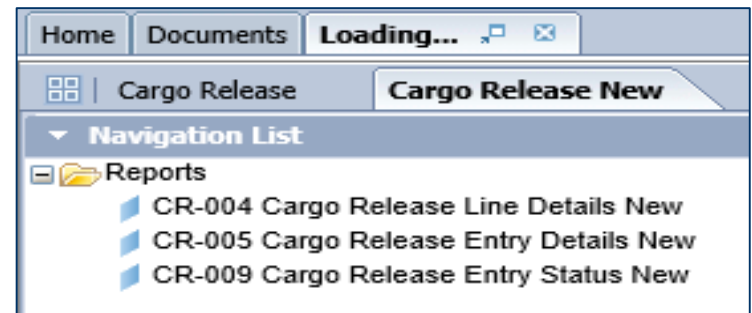
Select a priority for saving to MS Excel:

☐ Prioritize the formatting of the documents
☒ Prioritize easy data processing in Excel

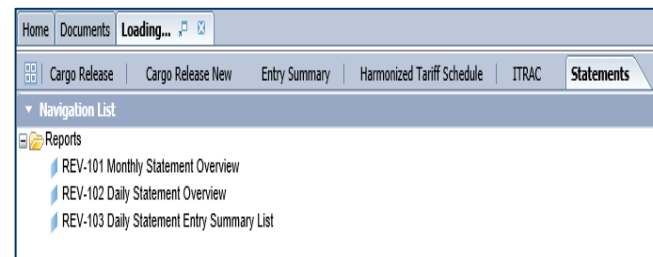
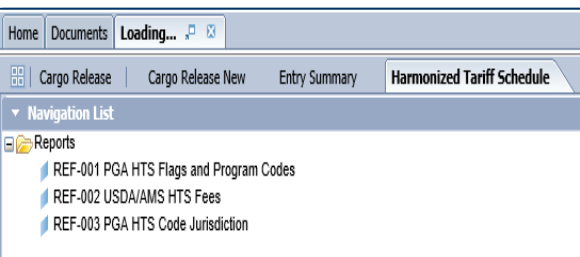
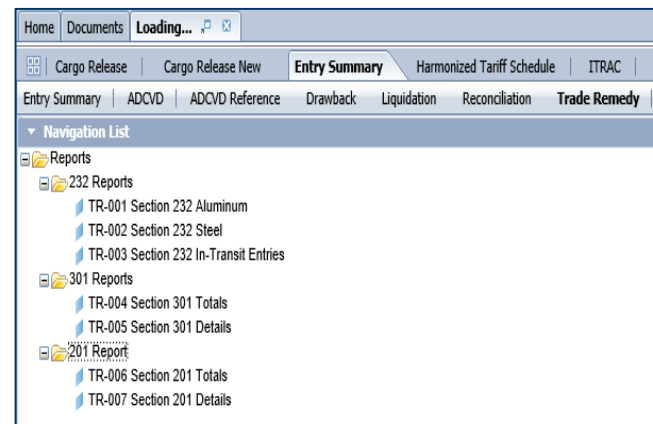
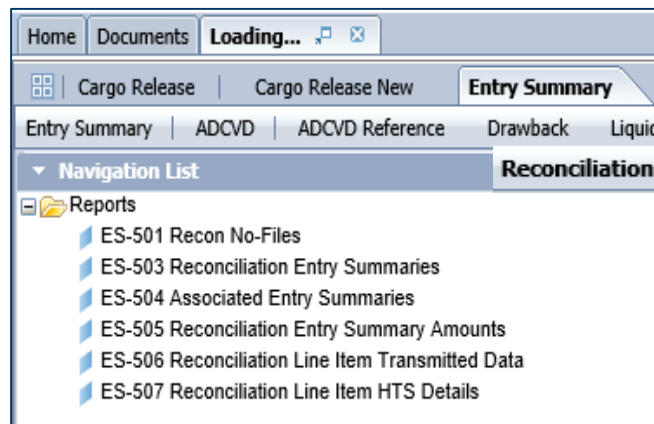
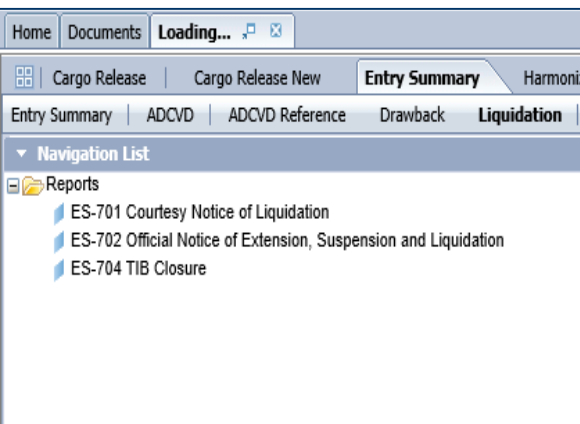
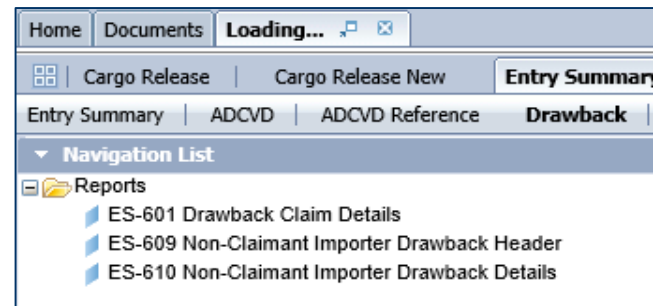
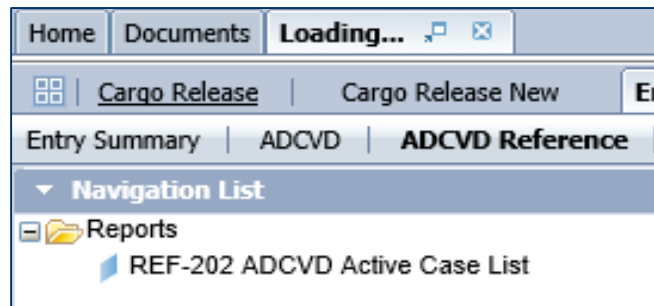
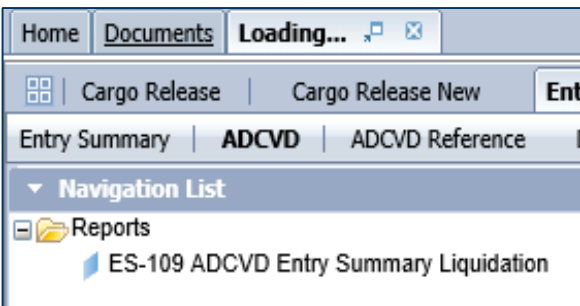
[Save](#) [Save & Close](#) [Cancel](#)



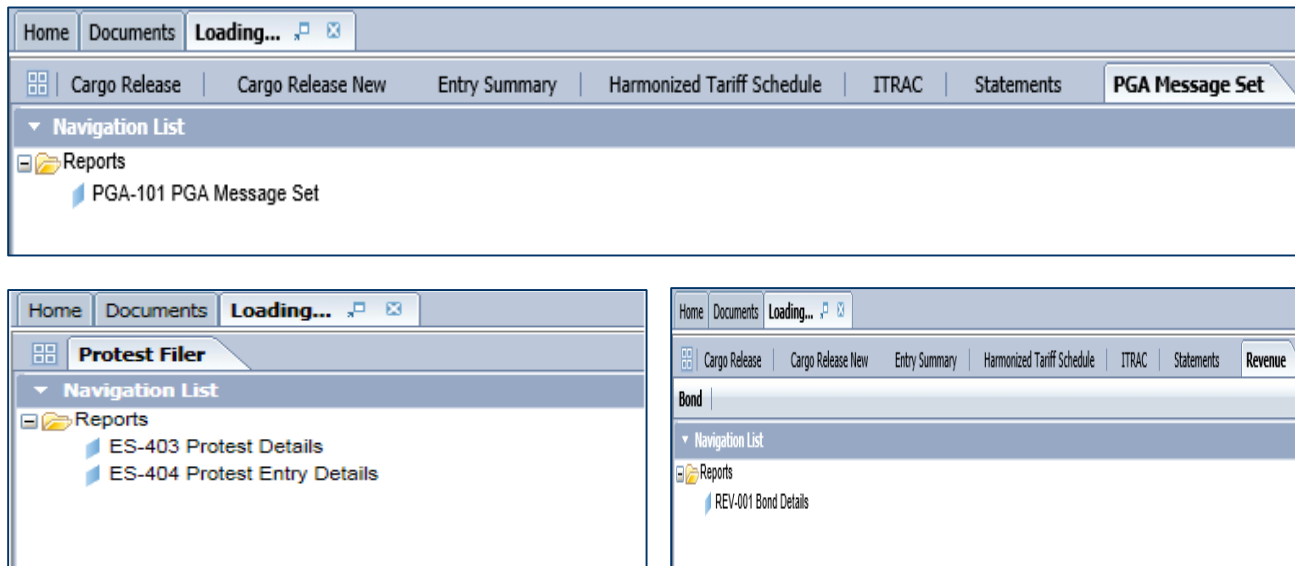
Import ACE Reports




Import ACE Reports (Cont.)



Import ACE Reports (Cont.)





Documents Tab



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Welcome: **JE727770** | [Applications](#) ▾ | [Preferences](#) | [Help menu](#) ▾ | [Log off](#)

Home Documents Loading...  

View ▾ New ▾ Organize ▾ Send ▾ More Actions ▾ Details

My Documents
Folders
Recycle Bin
Search


Search Results

No Items

Total: 0 items

The list panel is updated.

My Documents

 U.S. Customs and Border Protection

Welcome: **JE727770** | Applications | Preferences | Help menu | Log off

Home Documents Loading...

View New Organize Send More Actions Details

My Documents

Folders

Public Folders

ACE

ACE Home

Trade Workspaces

Training

Shared Reports

Recycle Bin

Search


Title ^	Type	Last Run	Instances	Description	Created By	Created On
ACE	Folder				Administrator	Apr 10, 2018 12:22 PM

Total: 1 items

A tree node is expanded.


100%

Public Folder



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Border Protection


Welcome: BV081dd | [Applications](#) | [Preferences](#) | [Help menu](#) | [Log off](#)

Home | Documents | Loading... 

View | New | Organize | Send | More Actions | Details

My Documents


Folders

 Public Folders

- ACE
 - ACE Home
 - Trade Workspaces
 - Training
 - Shared Reports


Recycle Bin

Search

Title ^	Type	Last Run	Instances
 ACE	Folder		

Total: 1 items

Search

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[Home](#) [Documents](#) [Loading...](#)

[View](#) [New](#) [Organize](#) [Send](#) [More Actions](#) [Details](#)

My Documents

Folders

Recycle Bin

Search

Search Results

No Items

Total: 0 items

The list panel is updated.

Recycle Bin



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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

100%

The list panel is updated.



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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

U.S. Customs and Border Protection

Welcome: Carlos Rodriguez | Applications ▾ | Preferences | Help menu ▾ | Log off



FOR OFFICIAL USE ONLY UNLESS OTHERWISE AUTHORIZED

NO DATA FOUND

Include Expired Records: ALL	HTS Number - Full: ALL	PGA Name Code: ALL
PGA Flag Code: ALL	PGA Program Code: ALL	Special Rate Indicator: ALL
Tax Fee Indicator: ALL		

HTS Number - Full	HTS Long Description	Effective Begin Date	Effective End Date	PGA Name Code	PGA Name	PGA Flag Code	PGA Flag	PGA Program Code	PGA Program Name	Special Rate Indicator
----------------------	----------------------	-------------------------	-----------------------	------------------	----------	------------------	----------	------------------------	------------------	------------------------------

REF-001 PGA HTS Flags and Program Codes Prompts

Prompts

Available prompt variants

Prompts Summary

✔

* Include Expired Records N

✔

HTS Number - Full 2712100000

✔

PGA Name Code

✔

PGA Flag Code

✔

PGA Program Code

✔

HTS Number - First 2

✔

HTS Number - First 4

✔

HTS Number - First 6

✔

HTS Number - First 8

✔

Effective Begin Date Greater than

✔

Effective End Date Less than

Include Expired Records

Type values here

Y

N

>


<

* Required prompts

OK

Cancel







REF-001 PGA HTS Flags and Program Codes Results


**U.S. Customs and Border Protection**

Welcome: **JE727770** | [Applications](#) | [Preferences](#) | [Help menu](#) | [Log off](#)

Home | Documents | Loading... | **Cargo Release** | Cargo Release New | Entry Summary | **Harmonized Tariff Schedule** | ITRAC | Statements | PGA Message Set

Viewer

Web Intelligence |  |  Track |  Drill |  Filter Bar |  Freeze |  Outline | [Reading](#) | [Design](#)

**REF-001**
PGA HTS Flags and Program Codes

FOR OFFICIAL USE ONLY UNLESS OTHERWISE AUTHORIZED

Report Parameters:

Include Expired Records: N	HTS Number - Full: 2712100000	PGA Name Code: ALL
PGA Flag Code: ALL	PGA Program Code: ALL	HTS Number - First 2: ALL
HTS Number - First 4: ALL	HTS Number - First 6: ALL	HTS Number - First 8: ALL
Effective Begin Date Greater than: ALL	Effective End Date Less than: ALL	

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

[Main Report](#) | [Parameters](#)

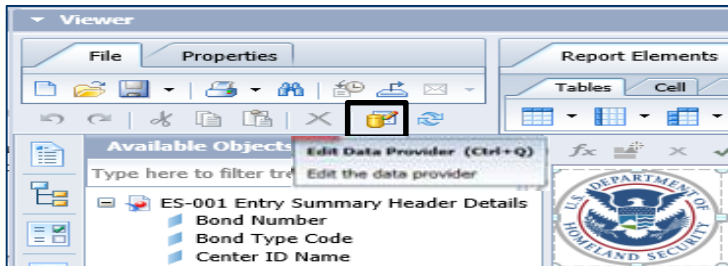
Main Report | Track changes: Off | Page 1 of 1 | 100% | 19 minutes ago

Modifying a Canned ACE Report



How to Modify an ACE Report

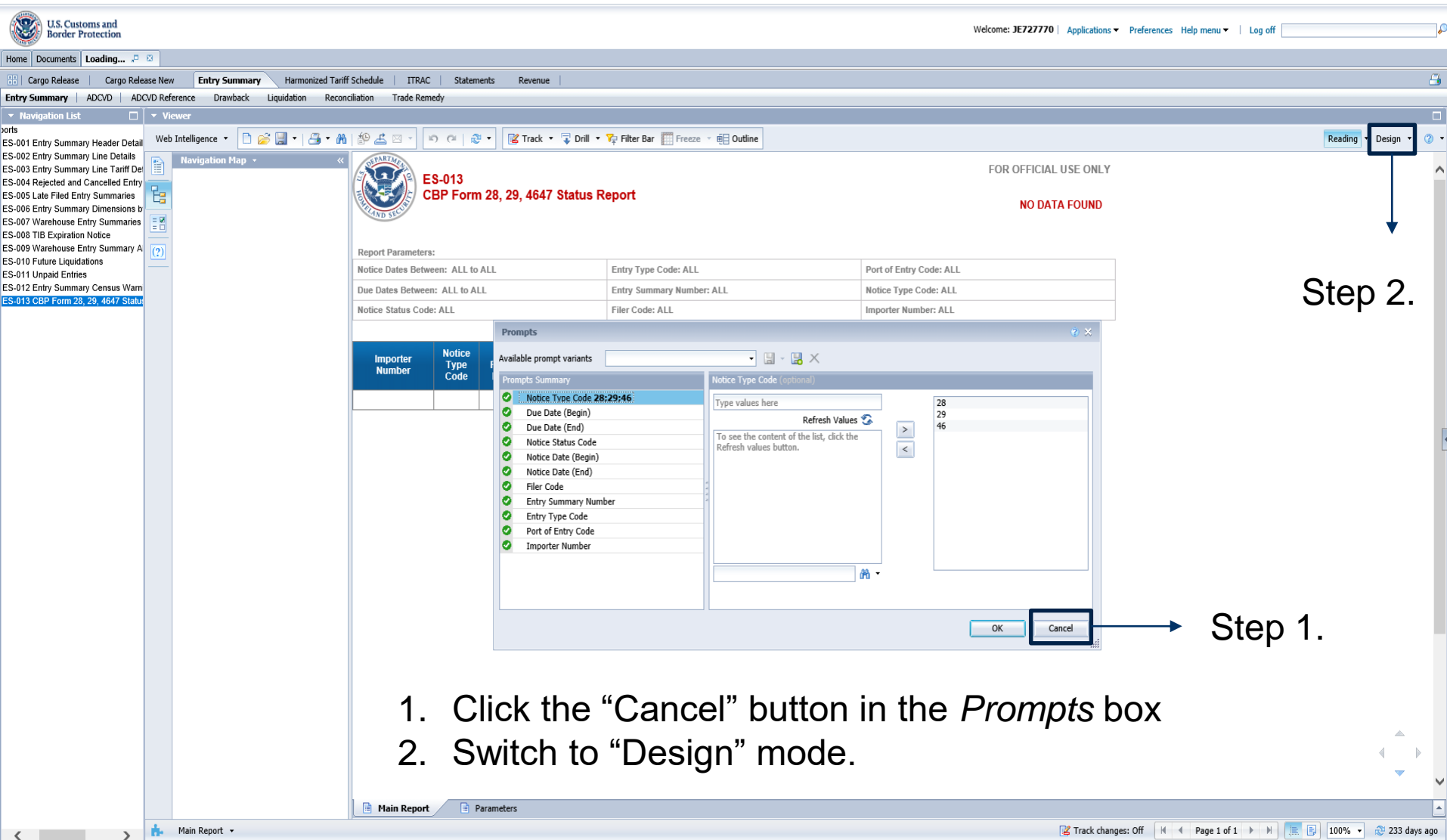
1. Launch the appropriate ACE Report.
2. Allow the report prompts to display, click on the **“Cancel”** button to display an empty report in **“Reading”** mode.
3. From the report’s main toolbar, click on **“Design”** button to switch view modes.
4. Once **“Design”** mode is displayed, click on the **“Edit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



U.S. Customs and Border Protection

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home | Documents | Loading... | Entry Summary | Harmonized Tariff Schedule | ITRAC | Statements | Revenue

Entry Summary | ADCVD | ADCVD Reference | Drawback | Liquidation | Reconciliation | Trade Remedy

Navigation List | Viewer

Web Intelligence | Track | Drill | Filter Bar | Freeze | Outline

Reading | Design

FOR OFFICIAL USE ONLY

NO DATA FOUND

ES-013
CBP Form 28, 29, 4647 Status Report

Report Parameters:

Notice Dates Between: ALL to ALL	Entry Type Code: ALL	Port of Entry Code: ALL
Due Dates Between: ALL to ALL	Entry Summary Number: ALL	Notice Type Code: ALL
Notice Status Code: ALL	Filer Code: ALL	Importer Number: ALL

Prompts

Available prompt variants

Importer Number	Notice Type Code

Prompts Summary

- ✓ Notice Type Code 28;29;46
- ✓ Due Date (Begin)
- ✓ Due Date (End)
- ✓ Notice Status Code
- ✓ Notice Date (Begin)
- ✓ Notice Date (End)
- ✓ Filer Code
- ✓ Entry Summary Number
- ✓ Entry Type Code
- ✓ Port of Entry Code
- ✓ Importer Number

Notice Type Code (optional)

Type values here

Refresh Values

To see the content of the list, click the Refresh values button.

28
29
46

OK Cancel

Step 1.

Step 2.

1. Click the "Cancel" button in the *Prompts* box

2. Switch to "Design" mode.

Main Report | Parameters

Track changes: Off | Page 1 of 1 | 100% | 233 days ago

Modifying an ACE Canned Report

The screenshot shows the ACE Canned Report interface. The 'Navigation Map' on the left contains a list of reports, with 'ES-013 CBP Form 28, 29, 4647 Status Report' selected. An arrow points from this report to the 'Main Report' icon in the 'Navigation Map' pane, which is labeled 'Step 1.'.

The main report area displays the title 'ES-013 CBP Form 28, 29, 4647 Status Report' and the text 'NO DATA FOUND'. Below this, the 'Report Parameters' section includes a table with the following data:

Report Parameters:		
Notice Dates Between: ALL to ALL	Entry Type Code: ALL	Port of Entry Code: ALL
Due Dates Between: ALL to ALL	Entry Summary Number: ALL	Notice Type Code: ALL
Notice Status Code: ALL	Filer Code: ALL	Importer Number: ALL

Below the parameters is a table with the following columns:

Importer Number	Notice Type Code	Trade Response Due Date	Status	Port of Entry Code	Filer Code	Entry Summary Number	Entry Type Code	Notice Date	Trade Response Date	Notice Issuing Team

At the bottom of the interface, the 'Main Report' tab is selected, and the status bar shows 'Track changes: Off', 'Page 1 of 1', '100%', and '275 days ago'.

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

The screenshot displays the Query Panel Editor interface with several key components and annotations:

- Query Panel Header:** Includes an "Add Query" dropdown and a toolbar with icons for query management. A "Run Query" button and a "Close" button are highlighted in the top right corner.
- Universe outline:** A tree view on the left showing the hierarchy of data objects. The "HTS" folder is expanded, and the "CVD Specific Rate" and "Goods Value Amount" items are highlighted with a box.
- Result Objects:** A grid of data fields available for selection, including "Action Type Code", "Trade Response Due Date", "Action Status Code", "Entry District Port Code", "Entry Number", "Action Create Date", "Trade Response Date", "Team Number", "Internal ES Number", "Importer Number", "Filer Code", "Entry Type Code", "Action Status Description", and "PSC Indicator".
- Query Filters:** A section for defining filters. The "Action Status Code" filter is selected, and the "In List" option is highlighted in a dropdown menu. The "OR" and "AND" logical operators are also highlighted.
- Data Preview:** A section at the bottom for viewing the results of the query.

Running the Query After Modifying an ACE Report

U.S. Customs and Border Protection

Welcome: JET27770 | Applications | Preferences | Help menu | Log off

Home | Documents | Loading... | Cargo Release | Statements | **Entry Summary** | Harmonized Tariff Schedule | Entry Summary | ADCVD | Liquidation | ADCVD Reference | Reconciliation | Drawback | Trade Remedy

File | Properties | Report Elements | Formatting | Data Access | Analysis | Page Setup | Tables | Cell | Section | Comment | Chart | Tools | Position | Linking

ES-013
CBP Form 28, 29, 4647 Status Report

FOR OFFICIAL USE ONLY

NO DATA FOUND

Report Parameters:

Notice Dates Between: ALL to ALL	Entry Type Code: ALL	Port of Entry Code: ALL
Due Dates Between: ALL to ALL	Entry Summary Number: ALL	Notice Type Code: ALL
Notice Status Code: ALL	Filer Code: ALL	Importer Number: ALL

Importer Number	Notice Type Code	Trade Response Due Date	Status	Port of Entry Code	Filer Code	Entry Summary Number	Entry Type Code	Notice Date	Trade Response Date	Notice Issuing Team
-----------------	------------------	-------------------------	--------	--------------------	------------	----------------------	-----------------	-------------	---------------------	---------------------

Prompts

Available prompt variants

Prompts Summary

- ✓ Notice Type Code 28;29;46
- ✓ Due Date (Begin)
- ✓ Due Date (End)
- ✓ Notice Status Code
- ✓ Notice Date (Begin)
- ✓ Notice Date (End)
- ✓ Filer Code
- ✓ Entry Summary Number
- ✓ Entry Type Code
- ✓ Port of Entry Code
- ✓ Importer Number

Notice Type Code (optional)

Type values here

Refresh Values

To see the content of the list, click the Refresh values button.

OK Cancel

1. Complete "Prompts"

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

The screenshot displays the SAP ACE system interface. The top navigation bar includes 'Home', 'Documents', and 'Loading...'. The main menu shows 'Cargo Release', 'Entry Summary', 'Statements', and 'Reference'. The 'Entry Summary' sub-menu is active, showing 'ADCVD', 'Liquidation', 'ADCVD Reference', and 'Reconciliation'. The 'Viewer' tab is selected, and the 'Design' view is active. The 'Available Objects' list on the left includes 'ES-013 CBP Form 28, 29, 4647 Status Report' and its sub-objects: 'Entry Summary Number', 'Entry Type Code', 'Filer Code', 'Importer Number', 'Notice Date', 'Notice Issuing Team', 'Notice Status', 'Notice Status Code', 'Notice Type Code', 'Port of Entry Code', 'Post Summary Correction Indicator', 'Trade Response Date', 'Trade Response Due Date', and 'Variables'. The 'Post Summary Correction Indicator' object is highlighted with a blue box, and a blue arrow points from it to the 'Post Summary Correction Indicator' column header in the report table. The report table has columns: 'Importer Number', 'Notice Type Code', 'Trade Response Due Date', 'Post Summary Correction Indicator', 'Status', 'Port of Entry Code', 'Filer Code', 'Entry Summary Number', 'Entry Type Code', 'Notice Date', 'Trade Response Date', and 'Notice Issuing Team'. The report title is 'ES-013 CBP Form 28, 29, 4647 Status Report' and the status is 'NO DATA FOUND'. The bottom status bar shows 'Main Report' and 'Parameters' tabs, and the footer includes 'U.S. Customs and Border Protection' and 'ace' logos.

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

Scheduling an ACE Report



Steps to Schedule an ACE Reports

SAP

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home Documents Loading...

View New Organize Send More Actions Details

My Documents

My Favorites

Inbox

My Alerts

Subscribed Alerts

Title ^	Type	Last Run	Instances	Description	Created By	Created On
AdhocTemp	Folder			Temp folder automatically created for adho	JE727770	Jul 19, 2017 2:32 PM
Carlos Rodriguez Folder	Folder				JE727770	Jul 19, 2017 3:55 PM
AES-201 Filer Transactions	Web Intelligence		1	AES-201 Filer Report Provides export transe	JE727770	Oct 5, 2017 11:16 AM
AM-100 Courtesy Notice of Liquidation	Web Intelligence		15		JE727770	Jul 31, 2017 8:50 AM
AM-100 Courtesy Notice of Liquidation patt2	Web Intelligence		2		JE727770	Oct 13, 2017 6:55 PM
Cargo Release Cancelled Report	Web Intelligence		0	Cargo Release Cancelled Report	JE727770	Aug 8, 2017 7:48 PM
ES-002 Entry Summary Line Details	Web Intelligence		0		JE727770	Jun 6, 2018 12:36 PM
ES-701 Courtesy Notice of Liquidation for Scheduling	Web Intelligence		0		JE727770	Jul 10, 2018 8:34 AM
ESM-7025 CBP Form 28, 29, 4647 Status Report	Web Intelligence		0	This report allows importers to query the st	JE727770	Aug 8, 2017 8:11 PM
ESM-7025 CBP Form 28, 29, 4647 Status Report Patti	Web Intelligence		2	This report allows importers to query the st	JE727770	Oct 13, 2017 6:48 PM

SAP

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home Documents Loading...

View New Organize Send More Actions Details

My Documents

My Favorites

Inbox

My Alerts

Subscribed Alerts

Title ^	Type	Last Run	Instances	Description	Created By	Created On
AdhocTemp	Folder			Temp folder automatically created for adho	JE727770	Jul 19, 2017 2:32 PM
Carlos Rodriguez Folder	Folder				JE727770	Jul 19, 2017 3:55 PM
AES-201 Filer Transactions	Web Intelligence		1	AES-201 Filer Report Provides export transe	JE727770	Oct 5, 2017 11:16 AM
AM-100 Courtesy Notice of Liquidation	Web Intelligence		15		JE727770	Jul 31, 2017 8:50 AM
AM-100 Courtesy Notice of Liquidation patt2	Web Intelligence		2		JE727770	Oct 13, 2017 6:55 PM
Cargo Release Cancelled Report	Web Intelligence		0	Cargo Release Cancelled Report	JE727770	Aug 8, 2017 7:48 PM
ES-002 Entry Summary Line Details	Web Intelligence		0		JE727770	Jun 6, 2018 12:36 PM
ES-701 Courtesy Notice of Liquidation for Scheduling	Web Intelligence		0		JE727770	Jul 10, 2018 8:34 AM
ESM-7025 CBP F	Web Intelligence		0	This report allows importers to query the st	JE727770	Aug 8, 2017 8:11 PM
ESM-7025 CBP F	Web Intelligence		2	This report allows importers to query the st	JE727770	Oct 13, 2017 6:48 PM

View Properties Modify Schedule Mobile Properties History Categories Document Link New Organize Send Details

Scheduled Report Settings

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title
ES-701 Courtesy Notice of Liquidation for Scheduling

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

Recurrence

Run object: Now

Object will run now.

Now
Once
Hourly
Daily
Weekly
Monthly
Nth Day of Month
1st Monday of Month
Last Day of Month
X Day of Nth Week of the Month
Calendar

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

Prompts

Modify values for: ES-701 Courtesy Notice

Entry Date (Begin)
Entry Date (End)
Liquidation Date (Begin)
Liquidation Date (End)
Liquidation Status
Entry Summary Number
Importer Number
Filer
Liquidation Basis
Liquidation Duty Determination
Control Team CEE
Team Number
Port of Entry Code

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

Formats

Output Format

☒ Web Intelligence

☐ Microsoft Excel

☐ Adobe Acrobat

☐ Comma Separated Values(CSV)

☐ Plain Text

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

Destinations

Destination:

Email

☒ Keep an instance in the history

☐ Use default settings

From: Add Placeholder

To: Add Placeholder

Cc: Add Placeholder

Bcc: Add Placeholder

Subject: Add Placeholder

Message:

Add Placeholder

☒ Add Attachment

File Name:

☒ Use Automatically Generated Name

☐ Use Specific Name

Add Placeholder

☒ Add File Extension

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

Schedule Cancel



Viewing Results of a Scheduled ACE Report

ace secure data portal

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home | Documents | Loading...

View | New | Organize | Send | More Actions | Details

My Documents

- My Favorites
- My Alerts
- Subscribed Alerts

Title	Received On	From	Type
ES-701 Courtesy Notice of Liquidation for Scheduling		Web Intelligence	


Total: 0 Items



Running Ad Hoc Reports



Creating Ad Hoc Reports



HomeDocumentsLoading...

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

ACE REPORTS

Role: Broker | Account ID: 0005676506

Search Workspaces:

Available Workspaces	Info
Trade	
Broker	
Training	
Training	

Create Ad Hoc Report

View ACE Reports Training Resources

Updates

12/21/2016 - New ACE Reports Data Dictionary for Trade now available on the ACE Reports Training Resources page
11/08/2016 - Updated ACE Reports User Guide now available on the ACE Reports Training Resources page
11/06/2016 - New ACE Reports Catalog now available on the ACE Reports Training Resources page
09/14/2016 - New Protest Filer workspace and report now available
09/14/2016 - New CR-007 Cargo Release Entry Status report now available for Brokers

Tips

Need Assistance?

The ACE Account Service Desk can be reached by phone at 866-530-4172 or via email at ACE.Support@cbp.dhs.gov

Selecting a Universe for Ad Hoc Reports

The screenshot displays the SAP ACE Reports web application. At the top, the SAP logo is on the left, and the user's role and account ID are on the right: "Welcome: JE727770 | Applications | Preferences | Help menu | Log off". Below the header, the main navigation bar includes "Home" and "Documents". The central area is titled "ACE REPORTS" and features a "Search Workspaces:" input field. A sidebar on the left lists "Available Workspaces" with options: "Trade", "Broker", "Training", and "Training". A modal dialog box titled "Create Ad Hoc Report" is open in the center. It contains a "Universe:" dropdown menu with "Select a Universe" as the current selection. Below this is a "Report Name:" field with the placeholder "Enter Report Name (Optional)". Further down is a "Report Description" field with the placeholder "Enter Report Short Description (Optional)". At the bottom of the dialog are two buttons: "✓ Create Adhoc" and "✗ Close". In the background, a "Scheduling a Report" section is visible, providing instructions on how to schedule a report and a link to a video resource. At the bottom of the page, a dark blue banner contains a question mark icon and the text: "Need Assistance? The ACE Account Service Desk can be reached by phone at 866-530-4172 or via email at ACE.Support@cbp.dhs.gov".

Sending an ACE Report to Another ACE Portal Account User

ace secure data portal

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home Documents Loading...

View | New | Organize | Send | More Actions | Details

My Documents

- My Favorites
 - AdhocTemp
 - Carlos Rodriguez Folder
- Inbox
- My Alerts
- Subscribed Alerts

Title	Type	Last Run	Instances
AdhocTemp	Folder		
Carlos Rodriguez Folder	Folder		
AM-100 Courtesy Notice of Liquidation	Web Intelligence		9
Cargo Release Cancelled F	Web Intelligence		0
ESM-7025 CBP Form 28, 2	Web Intelligence		0

View
Properties
Modify
Schedule
Mobile Properties
History
Categories
Document Link
New >
Organize >
Send >
Details

BI Inbox



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

Send AM-100 Courtesy Notice of Liquidation to BI Inbox

☐ Use default settings

Available Recipients:

Find Title: JE811CE

Find result for "JE811CE" in "User List"

User List

Group List

Group Hierarchy

Selected Recipients:

Find Title: JE811CE

JE811ce

Target Name:

☒ Use Automatically Generated Name

☐ Use Specific Name: Add Placeholder

☒ Add File Extension

Send As:

☐ Shortcut

☒ Copy

Send Cancel



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