



# Creating Ad Hoc Reports

ACE Reports

*April 2024*



U.S. Customs and  
Border Protection



# INTRODUCTION

Ad hoc reports are custom reports created from a blank form. You must set up the query filter to return data, add result objects to display, and set up the **Report View** to display the data.

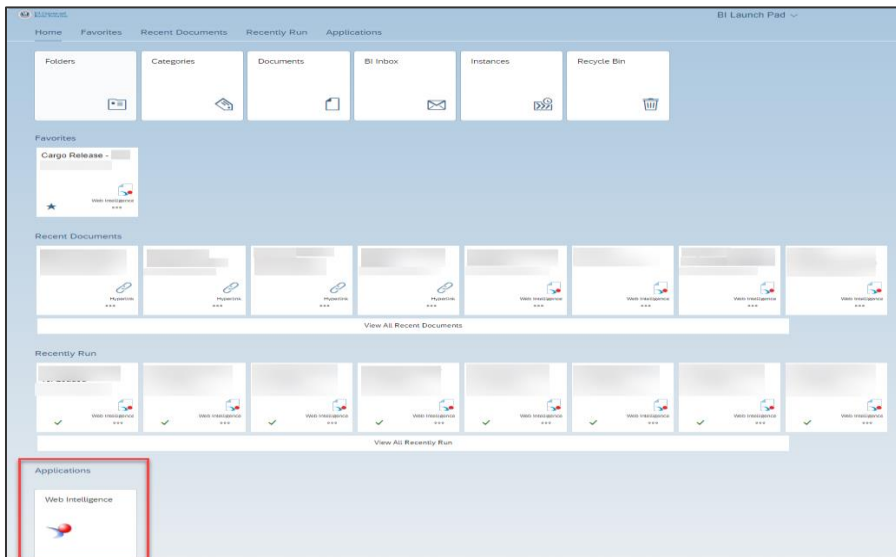
The first step to create an ad hoc report is to choose a universe to retrieve data objects. The universe determines what data objects are available for the report.



**IMPORTANT:** If you are using the multiple queries feature, you can use data objects from multiple universes in a separate table and/or chart on the same report. Combining data objects from multiple universes into a single table and/or chart is an advanced topic not covered in this document.

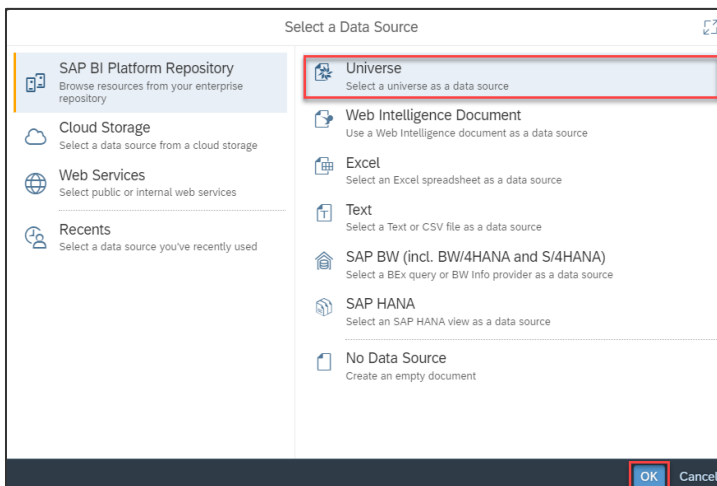
## CREATE AN AD HOC REPORT

1. In the **BI Launch Pad**, in the **Applications** section, select the **Web Intelligence** tile.

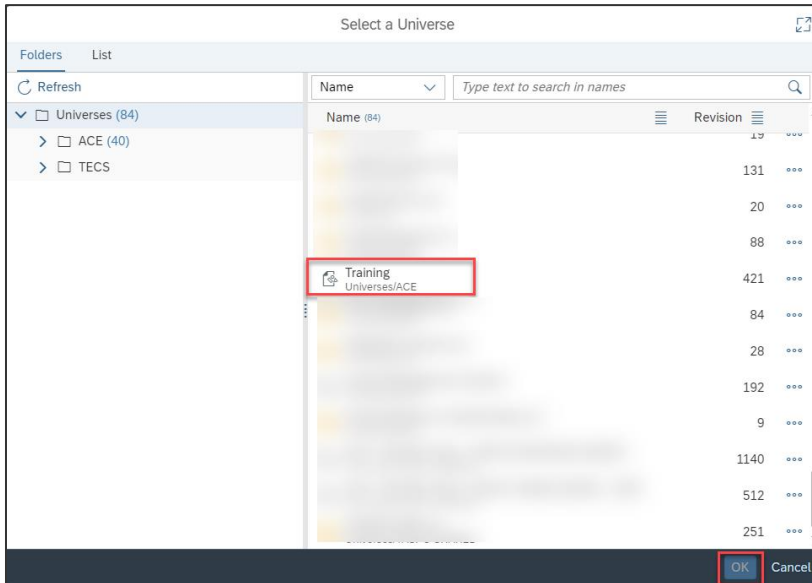


The **Select a Data Source** pane displays.

2. In the **Select a Data Source** pane, select the **Universe** option, and select the **OK** button.



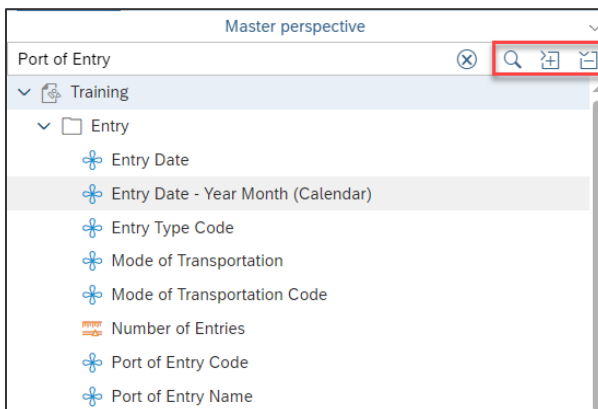
3. In the **Select a Universe** pane, select a universe and select **OK**.






The **Query Panel** for the new report displays.

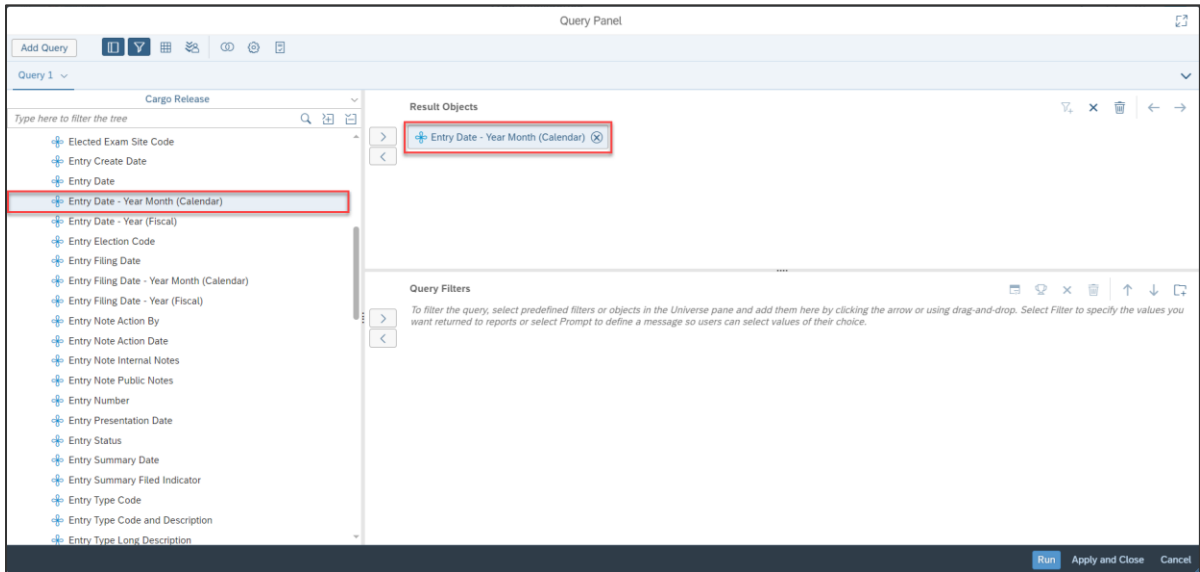
## BUILD THE REPORT

1. In the **Query Panel**, in the universe accordion menu(s), select a **Result Object** in the **Universe**.

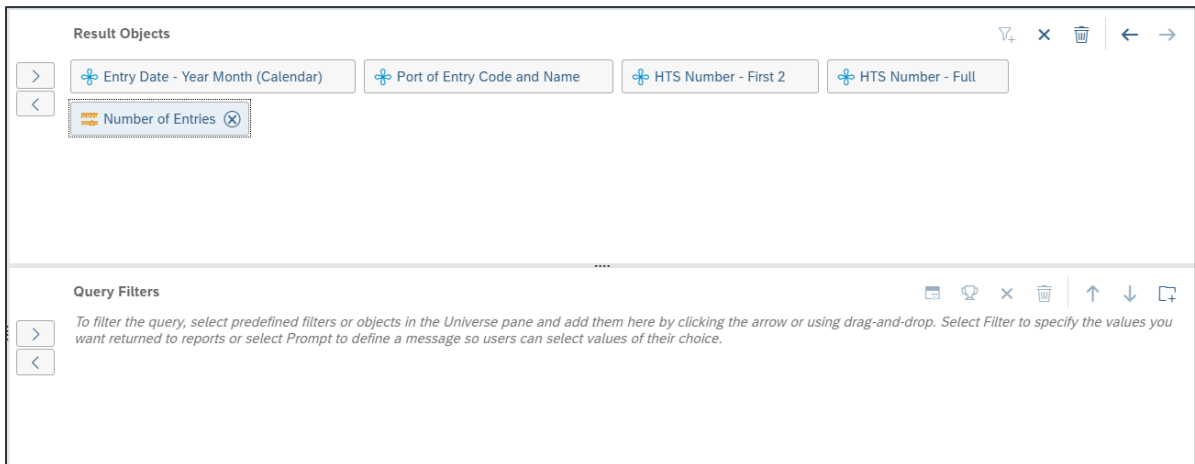



**NOTE:** If required, expand the accordion menus folders using the  icon, or use the search functionality at the top of the menus using the  icon.

2. Drag and drop the selected data object to the **Result Objects** area or select the object and use the  icon to move it to the **Result Objects** area.

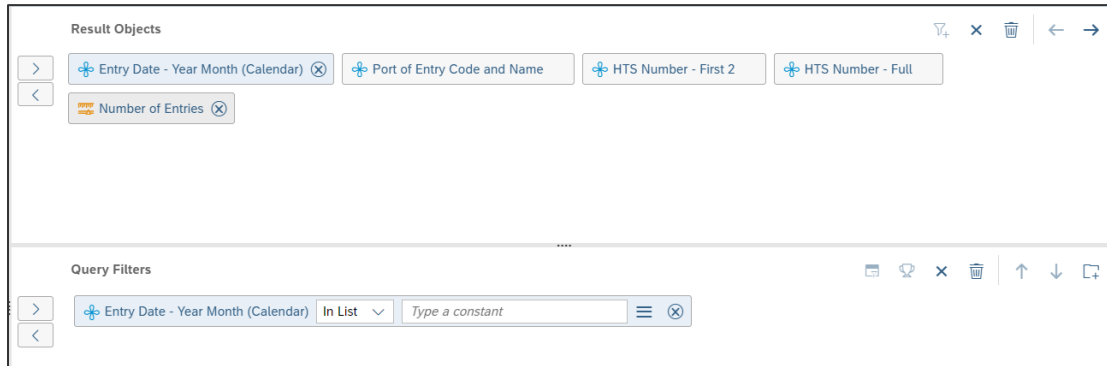



3. If necessary, repeat Steps 1 and 2 until all desired result objects are selected.



4. In the **Query Panel**, in the universe accordion menu(s), select an object as the query filter.
5. Drag and drop the selected data object into the **Query Filters** area or select the object and use the  icon to move it into the **Query Filters** area.

- Repeat Steps 4 and 5 until all desired query filters are selected.



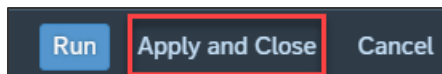
- In the query filter, for each filtered object, adjust the operator(s) and operand value(s).
- If necessary, select the **Click to Define filter type**  button, and adjust the operand type(s).




**NOTE:** The available operand types are:

- Constant:** Type a single value or multiple values.
- Value From List:** Either search for, or select manually, a single or multiple values from the **List of Values** dialog box to populate the **Value** field.
- Prompt:** Create a dynamic filter that allows the user to select values each time the report runs. For example, most standard reports include prompt filters.
- Object From This Query:** Uses another object from the Universe outline as the value for the filter data object. Use this option to create dynamic date filters using **Date Objects**.

- Select the **Apply and Close** button.



**IMPORTANT:** Before running your new report, select the **Apply and Close** button and **Save**  the report. See the **Saving and Exporting Reports QRC** for more detail. If you select **Run** from the **Query Panel** and the report times out while running, you will lose all changes.

- Select the **Save**  button to save the report.

See the **Saving and Exporting Reports QRC** for more detail.

- Select the **Refresh**  icon to run the report.

See the **ACE Reports Running a Standard Report QRC** for more detail.

The report displays.