Scheduling a Recurring Report

ACE Reports

January 2024

U.S. Customs and
Border Protection

INTRODUCTION

Schedule reports to:

- Run automatically at specified time intervals.

- Run very large reports as a background process to avoid the report failing due to a time-out.

Multiple users can schedule a single report. This allows a single shared report to retrieve data sets at personalized intervals and with personalized filters.

IMPORTANT: Remember to account for the nightly data update of ACE Reports. Schedule reports after 5:00 AM Eastern Time to ensure the update process has completed and results are up to date.
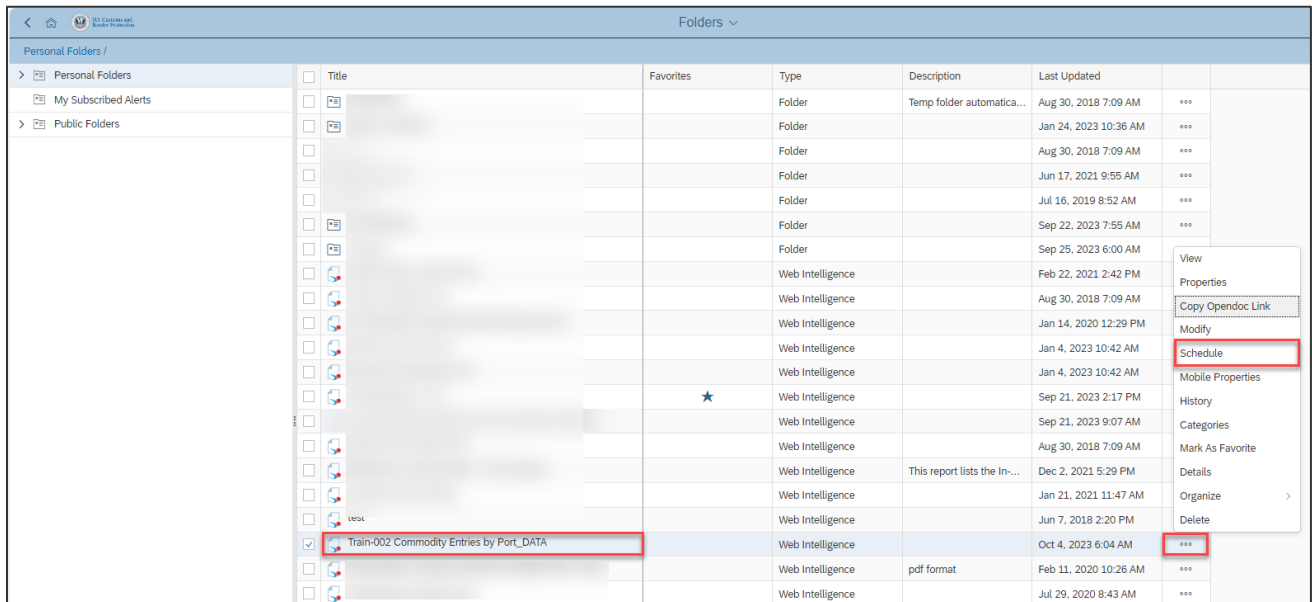
SCHEDULE A REPORT

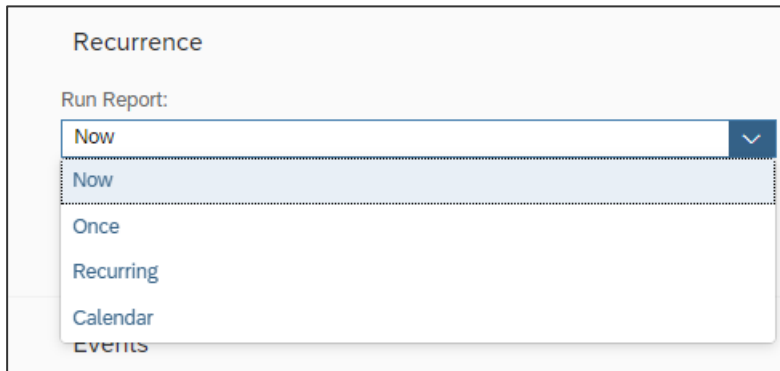1. In an **ACE Reports** folder, navigate to a specific saved ACE Report.

   NOTE: Ensure you save the document before scheduling. View the **Saving and Exporting Reports QRC** for more information.

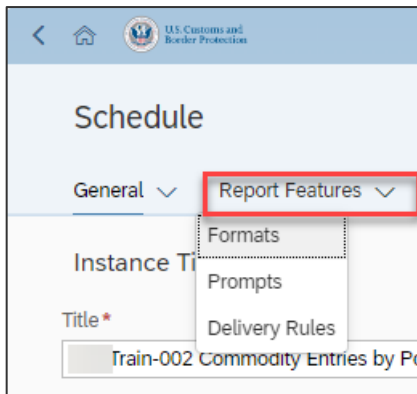2. In the report's **More** ⚬⚬⚬ (ellipsis) drop-down menu, select **Schedule**.

The **Schedule** pane displays.

3. If necessary, in the **General** tab, in the **Title*** field, rename the report.

4. In the **Recurrence** section, from the **Run Report:** drop-down menu, select a recurrence option.
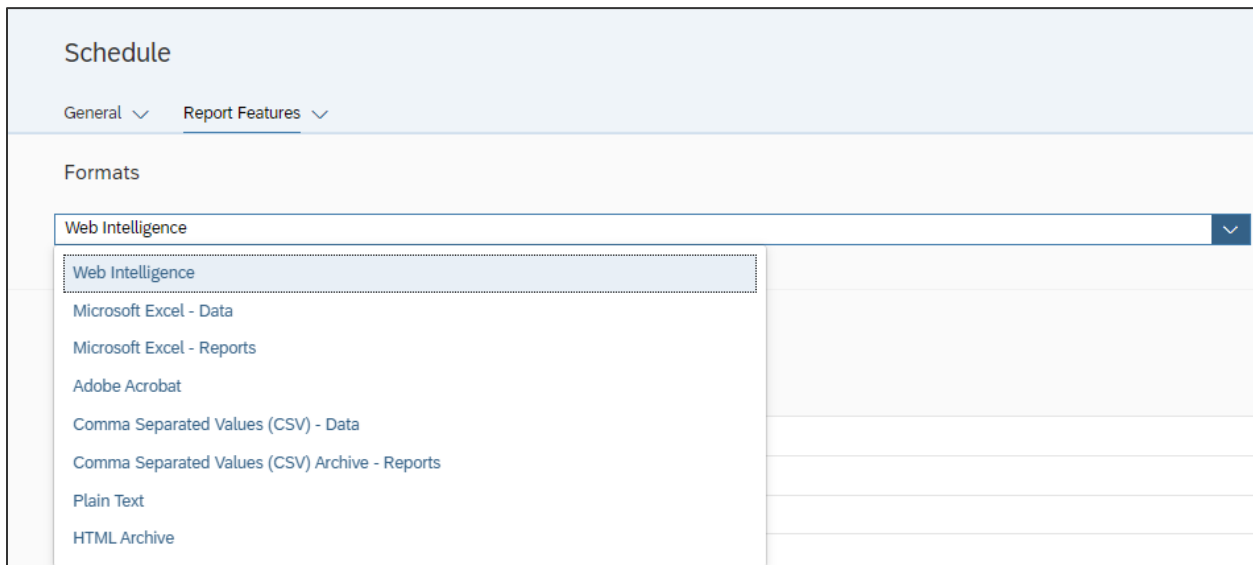
- Select **Now** to run the report immediately in the background while you continue to work.

- Select **Once** to choose a date and time to run a single instance of the report.

- Select **Recurring** to choose how often and the dates and times to run the report.

5. In the **Report Features** tab, set the criteria of your report.
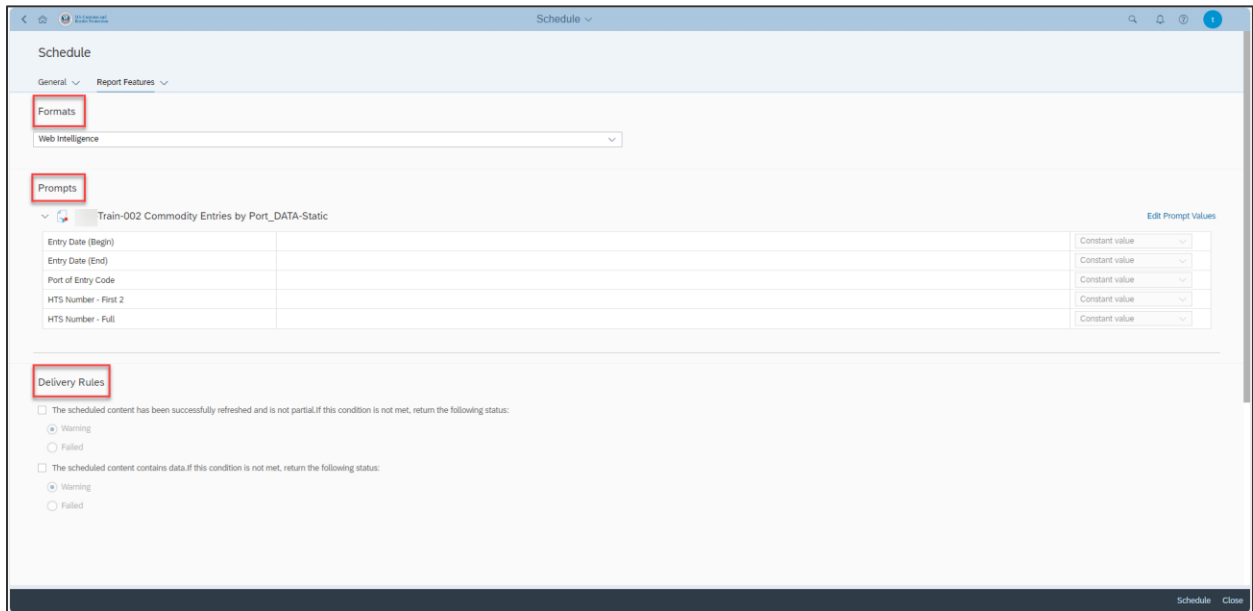
- **Formats** provides options for how the report instance is saved.

  - o **Web Intelligence:** .webi file you can open and edit only in **ACE Reports**.
  - o **Microsoft Excel:** .xlsx file you can open in a spreadsheet application.
  - o **Adobe Acrobat**: A PDF file that is not editable.
  - o **CSV**: A plain text comma-separated values file suitable for import into many applications.
  - o **Comma Separated Values (CSV) archive - Reports**: Saves the report instance as a ZIP file.
  - o **TXT**: Saves the report instance as a plain text file with no formatting.
- If necessary, in **Prompts**, review or modify the prompt values.

- If necessary, in **Delivery Rules**, edit the delivery rules.

6. Select the **Schedule** button.
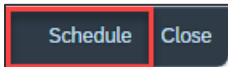
The **History** pane displays, showing the **Status**.

IMPORTANT: For data privacy reasons, if you are a Trade user with a cross-account (more than one account), you cannot directly email a scheduled report instance. You must down the report instance from the **History** or **Instances** pane.

Before sharing a retrieved report, please review the contents of the report to ensure the data pertains to the intended recipient(s).

When the report runs successfully, a **Success** message displays in the **Status** column.
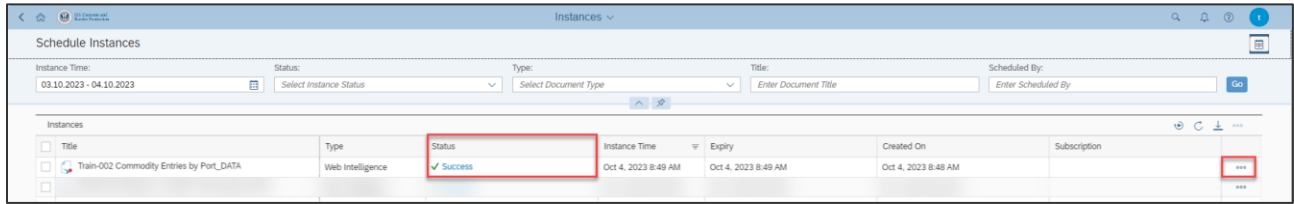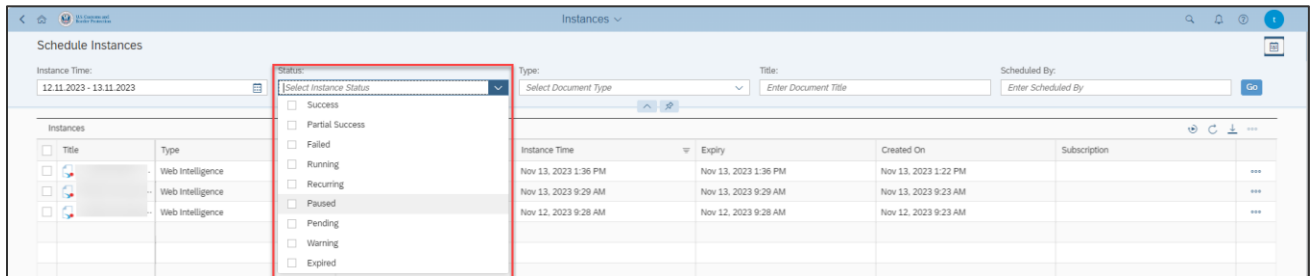
Select the **More** ∘∘∘ (ellipsis) for additional functional options, if required.
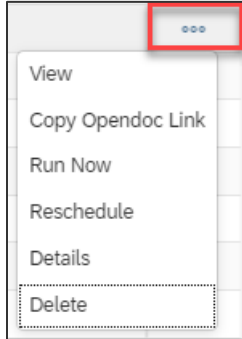
You can also check the status of your scheduled reports in the **Instances** tile.
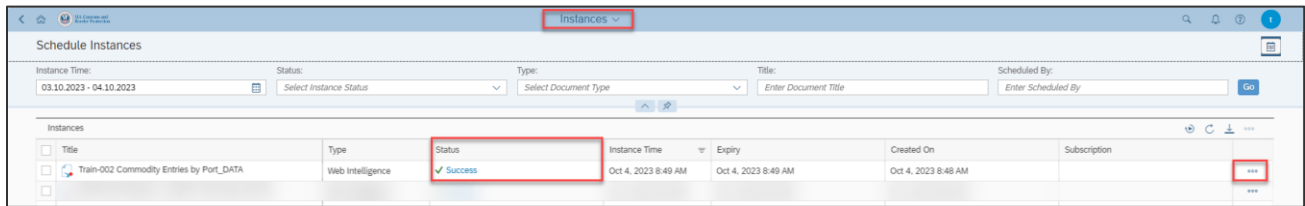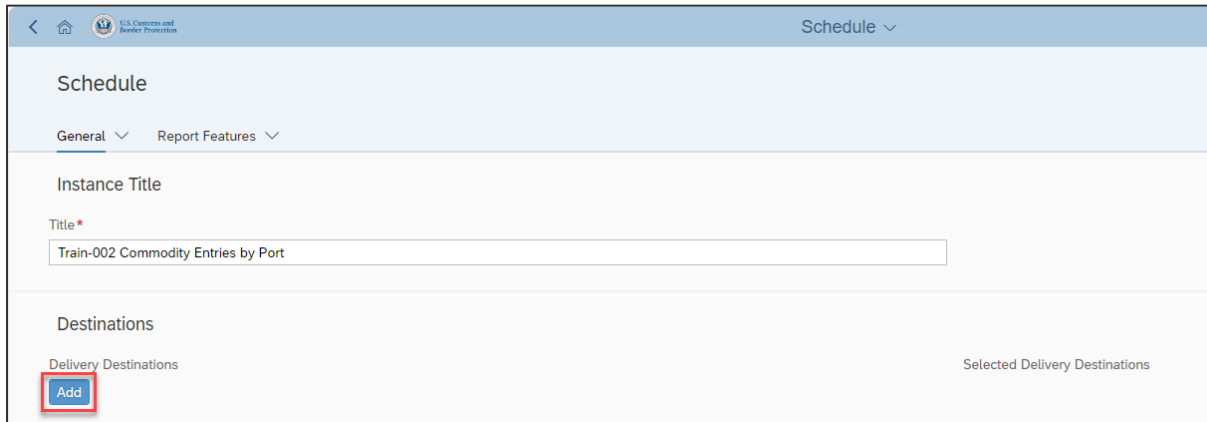

Use the **Status** drop-down menu to filter the displayed report instances.
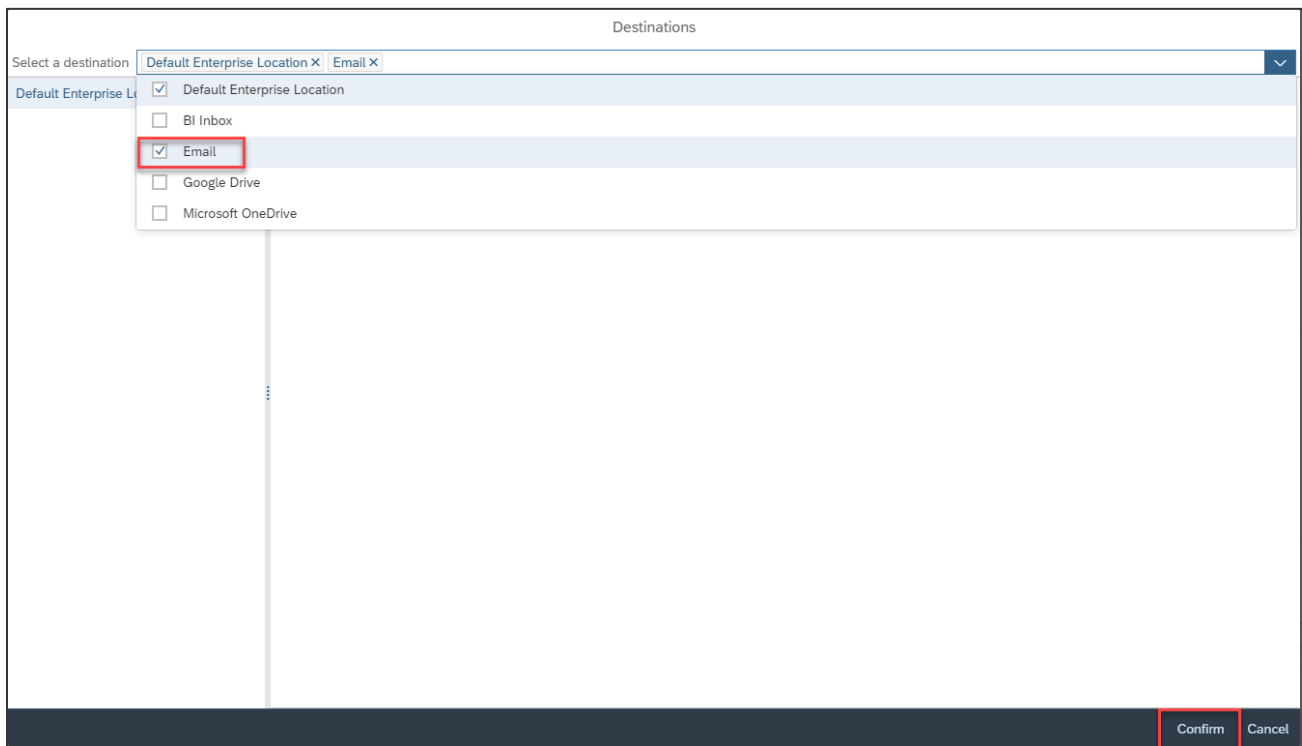
EMAIL A REPORT

1. In the **Schedule** pane, select the **Add** button under **Destinations**.

2. In the **Destinations** pane:

   a. Select the **Email** option.

   b. Select the **Confirm** button.
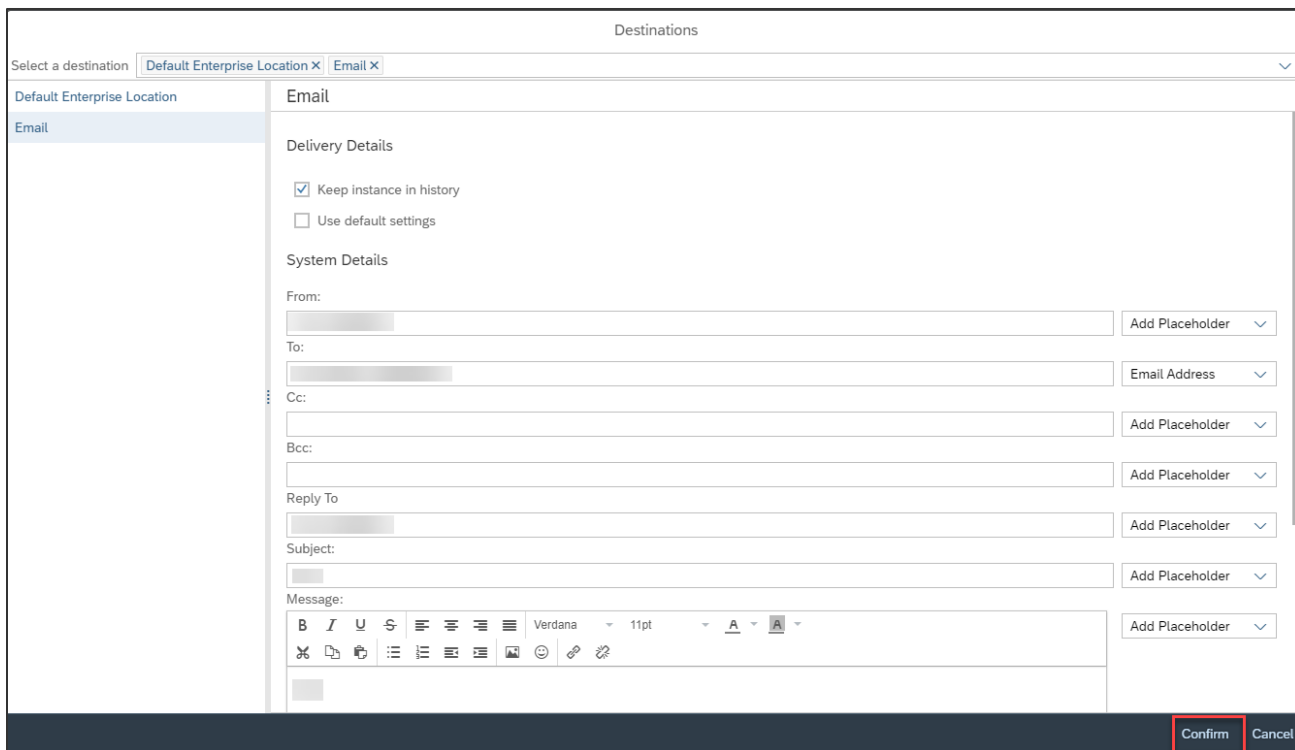
3. In **Destinations**, select **Email** in **Selected Delivery Destinations**.

4. In the **Destinations** pane:

    a. If required, in **Delivery Details**, select any criteria.

    b. Complete the email fields as necessary.

    c. Select the **Confirm** button.