



# 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.

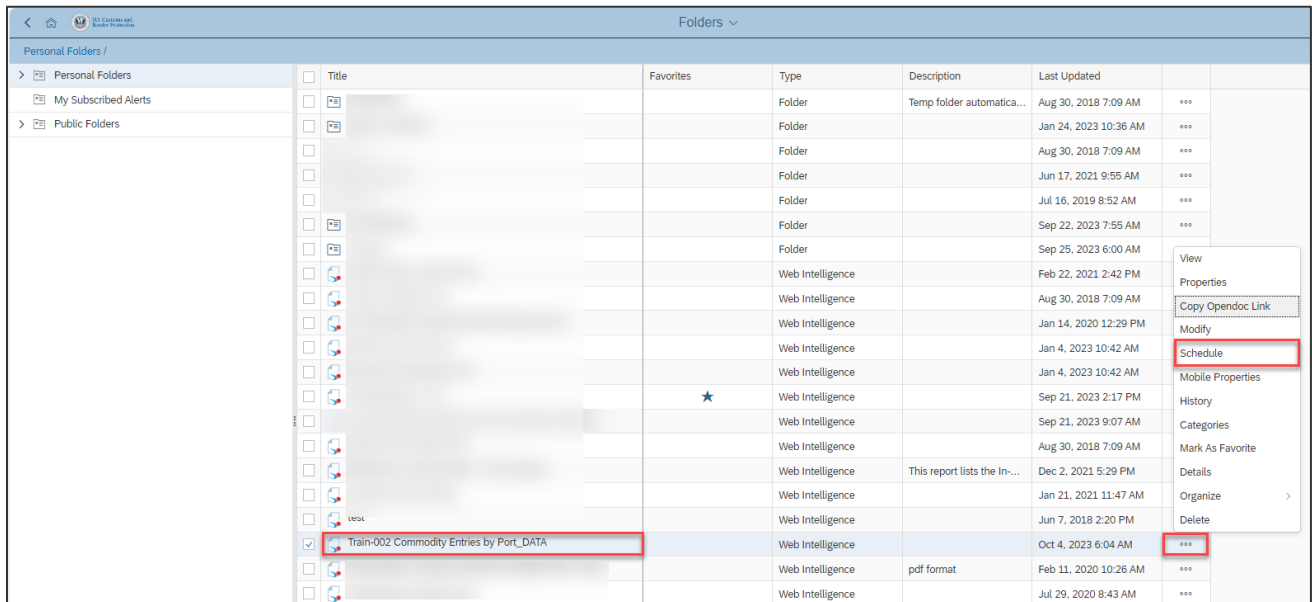
## SCHEDULE A REPORT

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



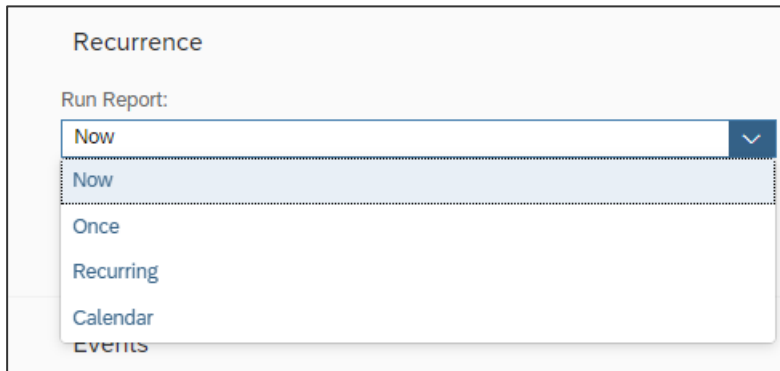
**NOTE:** Ensure you save the document before scheduling. View the **Saving and Exporting Reports QRC** for more information.

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



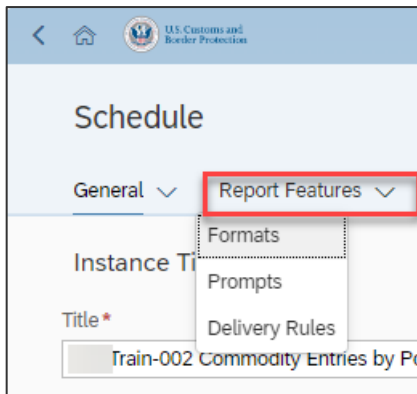
The **Schedule** pane displays.

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.

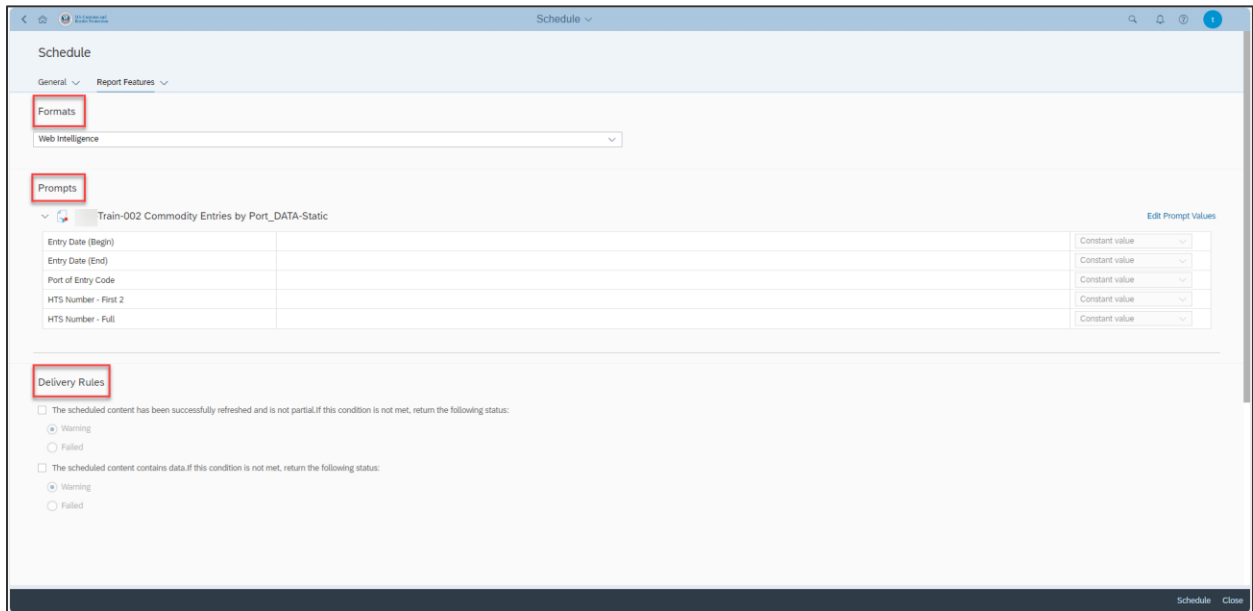


The image shows a 'Recurrence' dropdown menu. The menu is open, showing the following options: 'Now', 'Once', 'Recurring', 'Calendar', and 'EVENTS'. The 'Now' option is currently selected and highlighted.

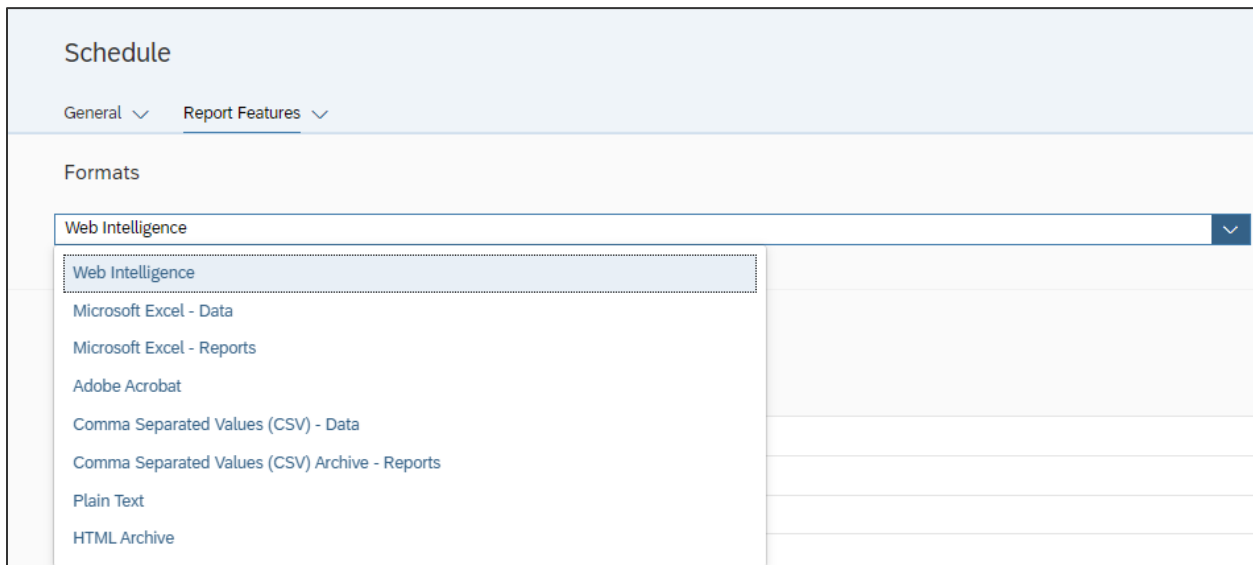
- Select **Now** to run the report immediately in the background while you continue to work.
  - Select **Once** to choose a date and time to run a single instance of the report.
  - Select **Recurring** to choose how often and the dates and times to run the report.
5. In the **Report Features** tab, set the criteria of your report.



The image shows a mobile application screen titled 'Schedule' from the U.S. Customs and Border Protection. The screen has a navigation bar at the top with a home icon and the agency name. Below the title, there are two tabs: 'General' and 'Report Features'. The 'Report Features' tab is highlighted with a red box. Below the tabs, there are several sections: 'Instance T...', 'Title \*', and a text input field containing 'Train-002 Commodity Entries by Po'. A dropdown menu is open under the 'Report Features' tab, showing options: 'Formats', 'Prompts', and 'Delivery Rules'.



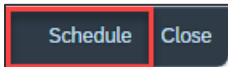
- **Formats** provides options for how the report instance is saved.



- **Web Intelligence:** .webi file you can open and edit only in **ACE Reports**.
- **Microsoft Excel:** .xlsx file you can open in a spreadsheet application.
- **Adobe Acrobat:** A PDF file that is not editable.
- **CSV:** A plain text comma-separated values file suitable for import into many applications.
- **Comma Separated Values (CSV) archive - Reports:** Saves the report instance as a ZIP file.
- **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**.

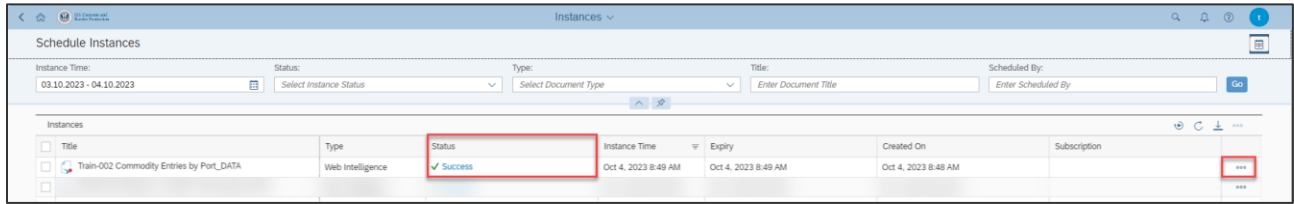
Title	Status	Instance Time	Created By	Type	Parameters
-Train-002 Commodity Entries by Port	Running	Nov 13, 2023 1:31 PM		Web Intelligence	
-Train-002 Commodity Entries by Port_DATA-Static	Success	Nov 13, 2023 1:36 PM		Web Intelligence	



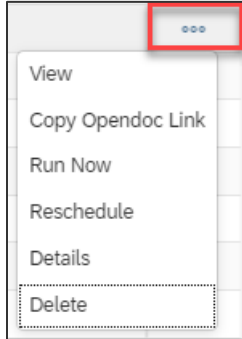
**IMPORTANT:** For data privacy reasons, if you are a Trade user with a cross-account (more than one account), you cannot directly email a scheduled report instance. You must down the report instance from the **History** or **Instances** pane.

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

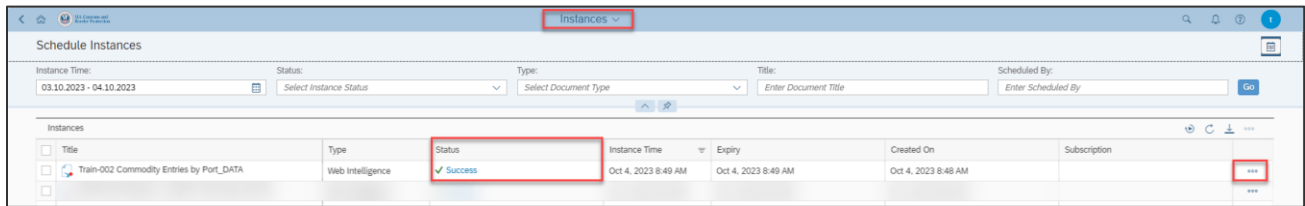
When the report runs successfully, a **Success** message displays in the **Status** column.



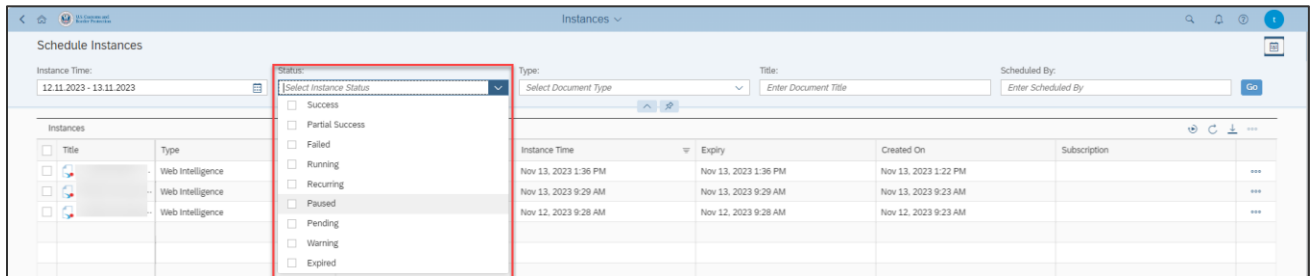
Select the **More** (ellipsis) for additional functional options, if required.



You can also check the status of your scheduled reports in the **Instances** tile.

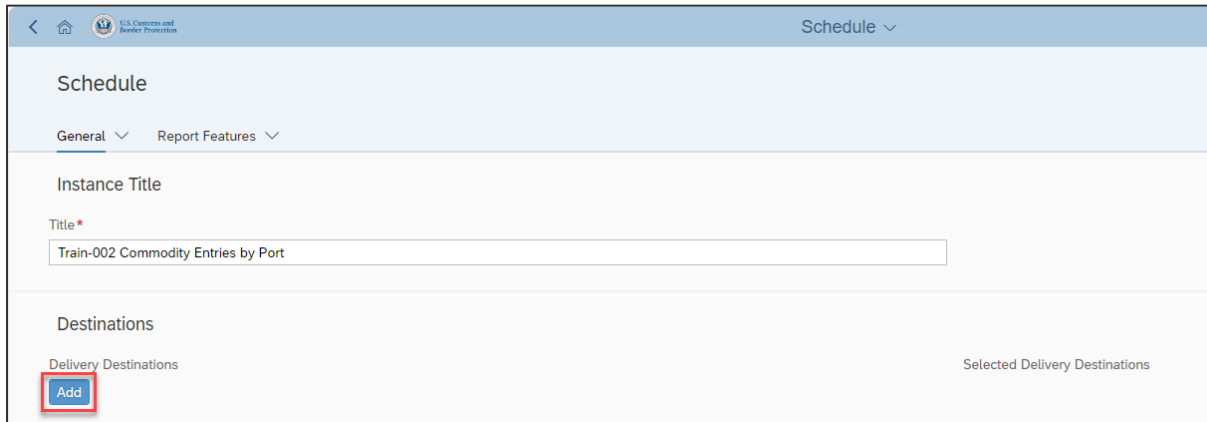


Use the **Status** drop-down menu to filter the displayed report instances.



## EMAIL A REPORT

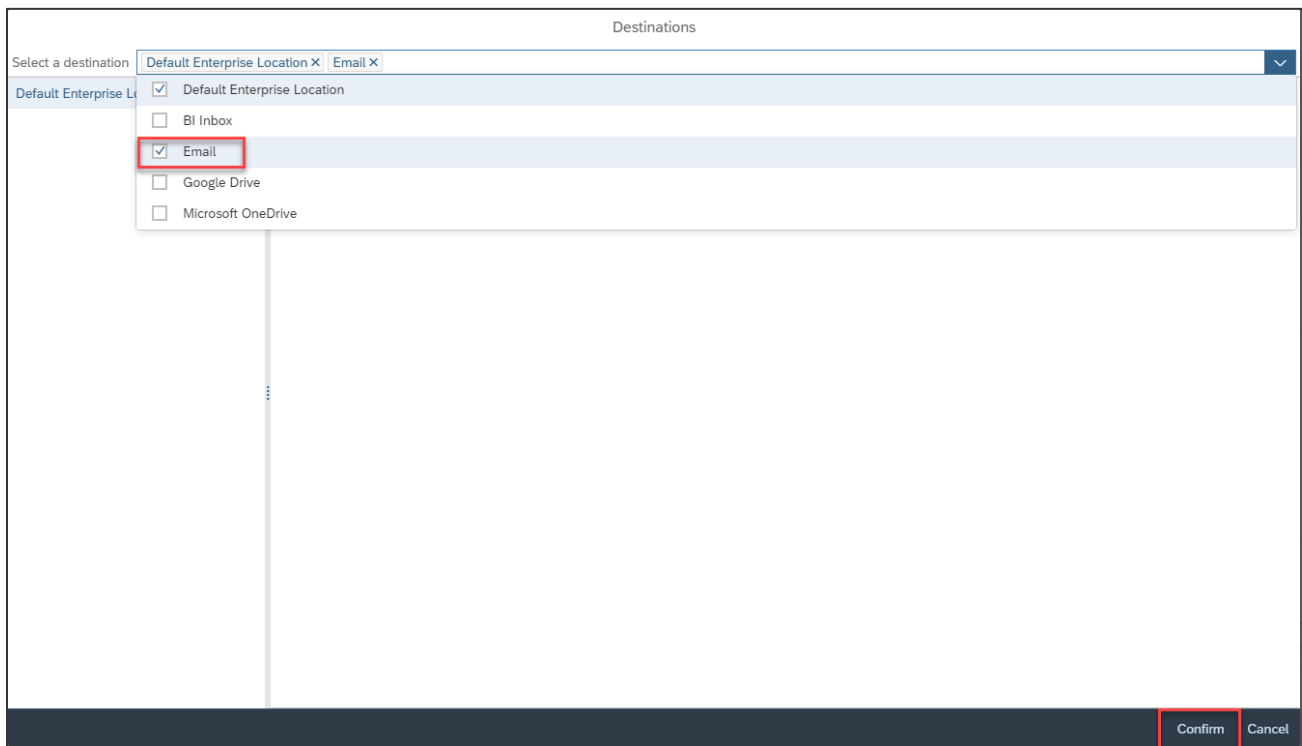
1. In the **Schedule** pane, select the **Add** button under **Destinations**.



The screenshot shows the 'Schedule' pane with the following elements:

- Navigation: Home icon, U.S. Customs and Border Protection logo, and a 'Schedule' dropdown menu.
- Section: 'Schedule' with sub-sections 'General' and 'Report Features'.
- Instance Title: 'Train-002 Commodity Entries by Port'.
- Destinations: A section with 'Delivery Destinations' and 'Selected Delivery Destinations' labels. An 'Add' button is highlighted with a red box.

2. In the **Destinations** pane:
  - a. Select the **Email** option.
  - b. Select the **Confirm** button.



The screenshot shows the 'Destinations' pane with the following elements:

- Header: 'Destinations'.
- Dropdown: 'Select a destination' with 'Default Enterprise Location X' and 'Email X' selected.
- List of destinations:
  - Default Enterprise Location
  - BI Inbox
  - Email (highlighted with a red box)
  - Google Drive
  - Microsoft OneDrive
- Buttons: 'Confirm' and 'Cancel' buttons at the bottom right, with 'Confirm' highlighted by a red box.

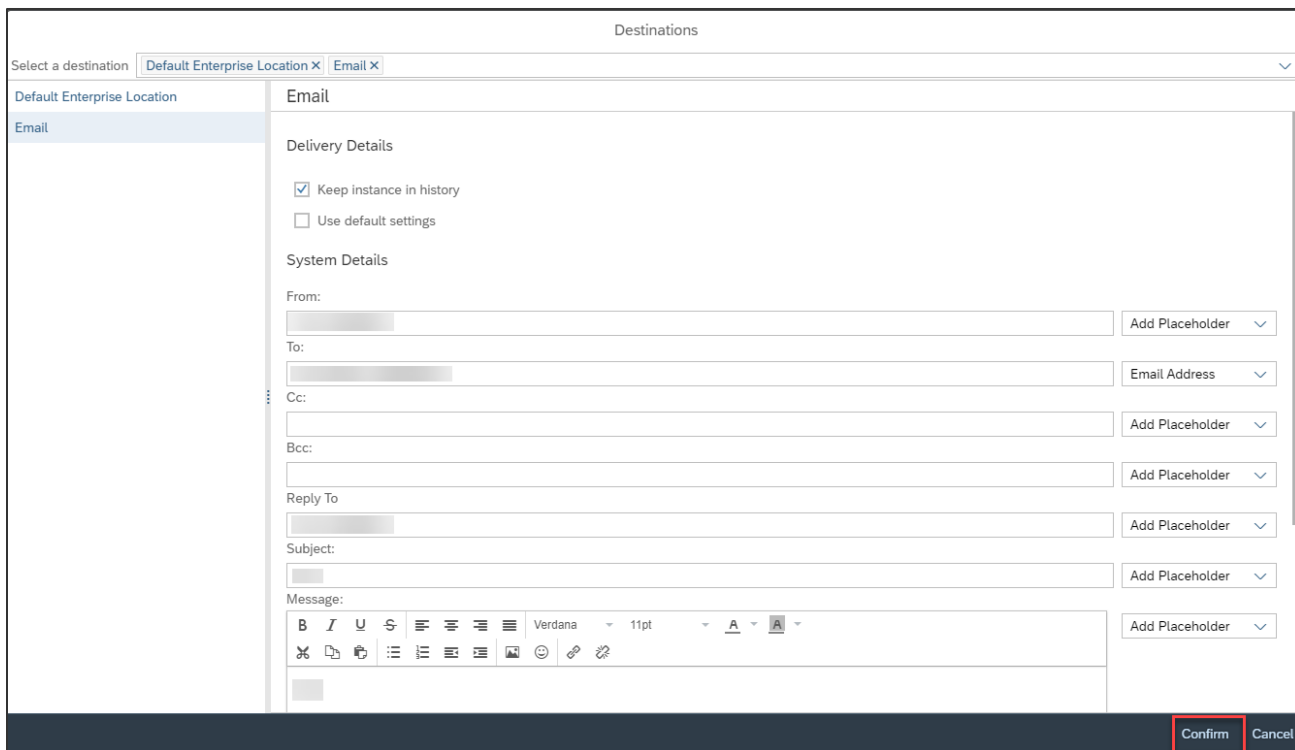
3. In **Destinations**, select **Email** in **Selected Delivery Destinations**.



The screenshot shows the 'Destinations' pane with the following elements:

- Section: 'Destinations'.
- Buttons: 'Add' button under 'Delivery Destinations'.
- Selected Delivery Destinations: A list containing 'Default Enterprise Location' and 'Email' (highlighted with a red box). Each item has a close button (X) to its right.

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.



Destinations

Select a destination: Default Enterprise Location x | Email x

Default Enterprise Location

Email

Delivery Details

Keep instance in history

Use default settings

System Details

From: [Placeholder] Add Placeholder

To: [Placeholder] Email Address

Cc: [Placeholder] Add Placeholder

Bcc: [Placeholder] Add Placeholder

Reply To: [Placeholder] Add Placeholder

Subject: [Placeholder] Add Placeholder

Message: [Placeholder] Add Placeholder

Confirm Cancel