How to Schedule AFRS Exception Reports in Enterprise Reporting (ER)

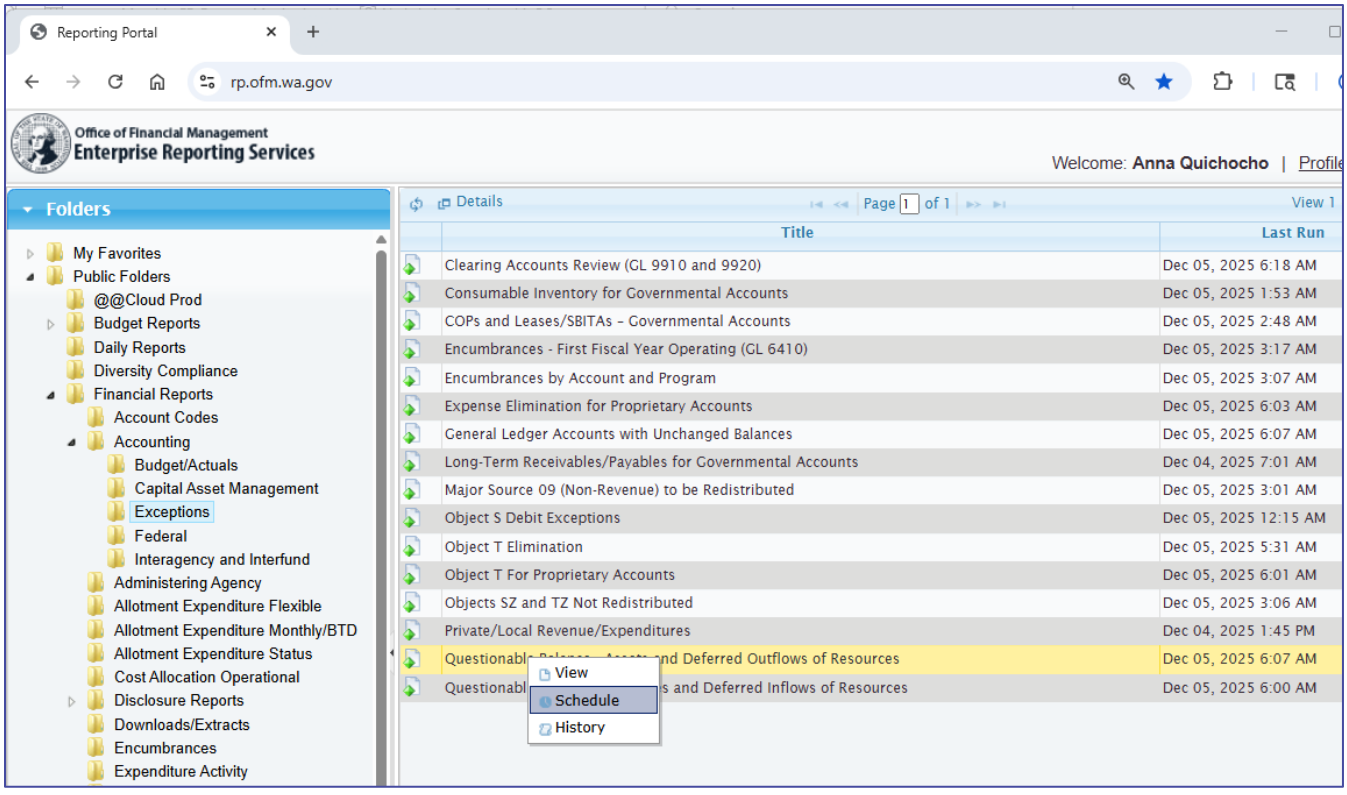
This document shows how to schedule AFRS Exception reports in ER for users already familiar with this reporting system. Refer to the training on the Enterprise Reporting website for training and more detailed instructions.

Below you will find instructions and sample parameters for:

- Scheduling the Monthly Exception Reports to run after the AFRS fiscal month closes
- Scheduling the Monthly and Year-End Exception Reports to run daily at year-end

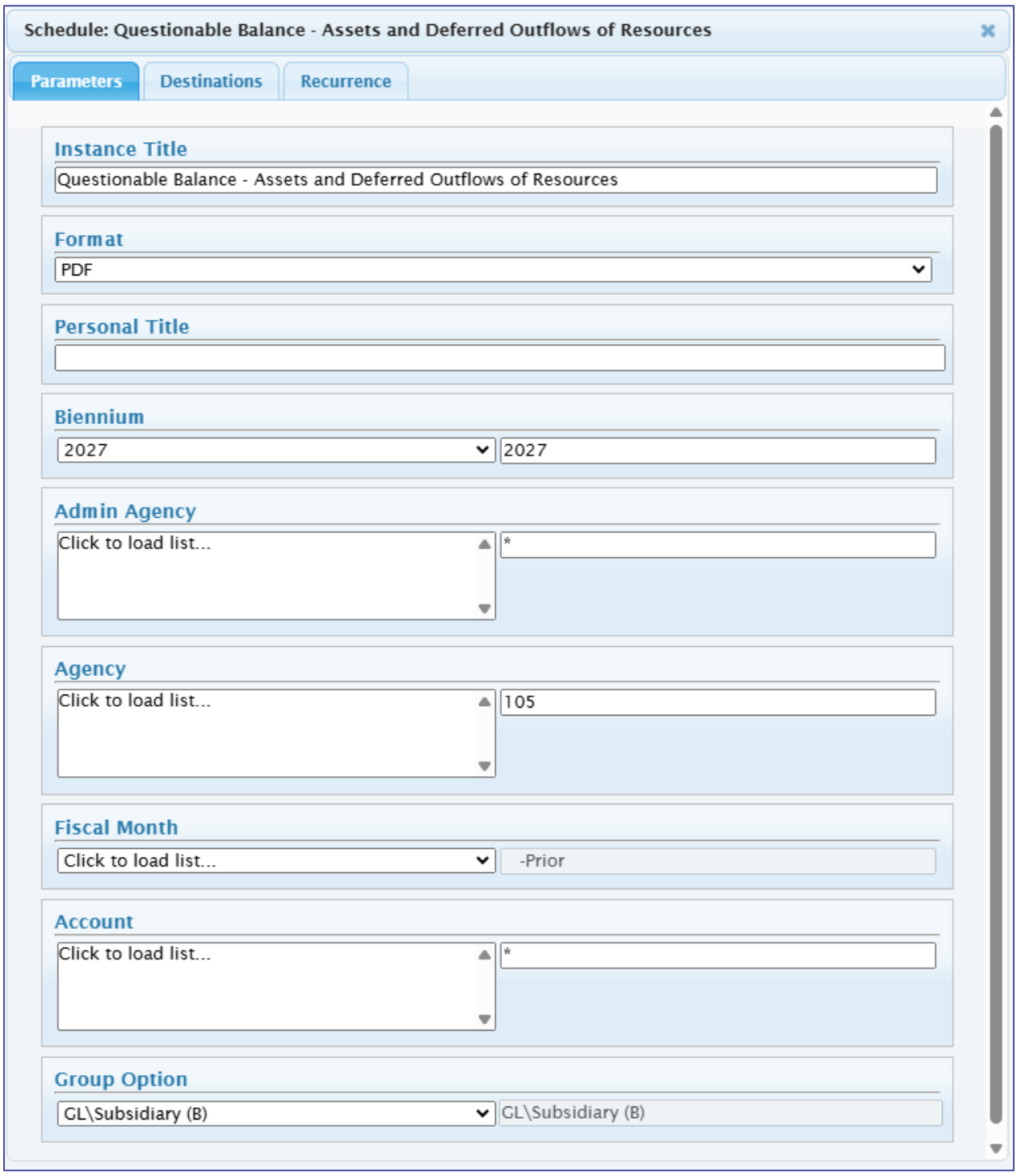
Scheduling Monthly Reports to run after the AFRS Fiscal Month Closes

1. **Log-on to Enterprise Reporting**
2. **Navigate to the report** you want to schedule. **Right click** on the report title and **Select Schedule**



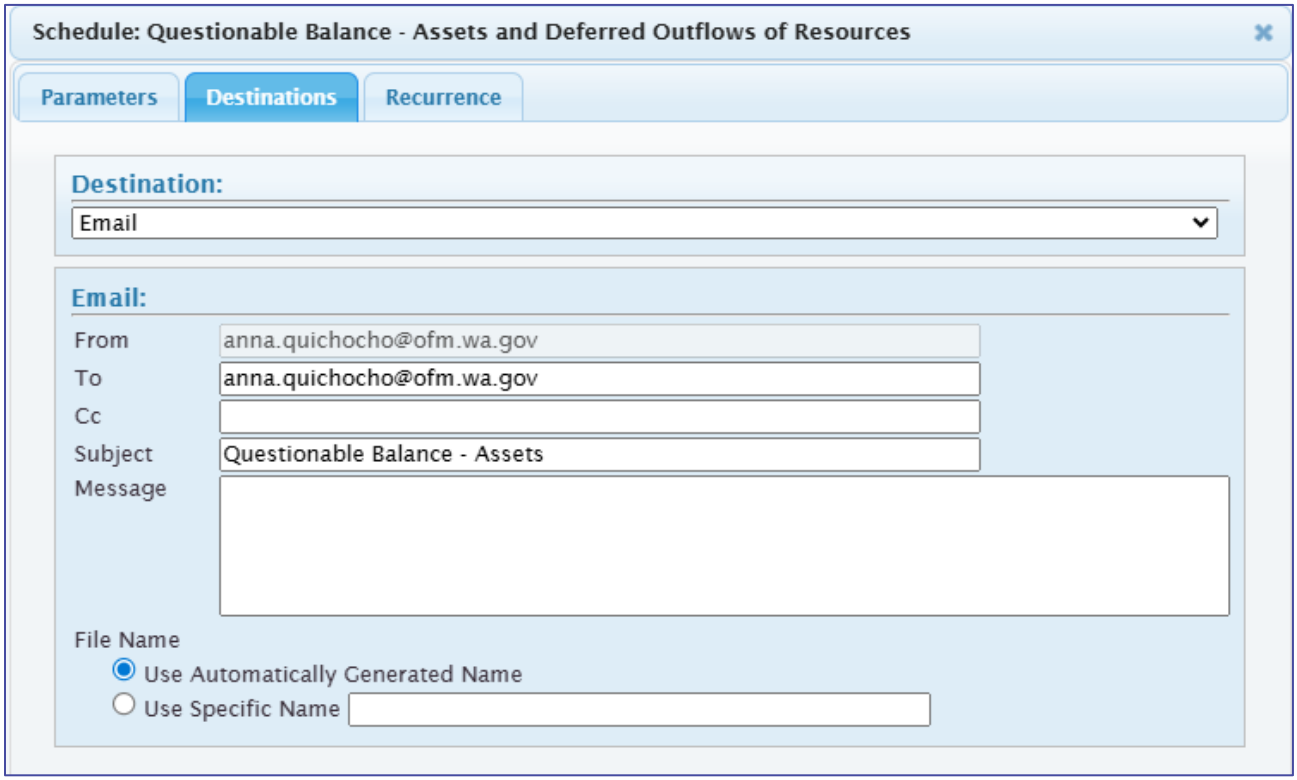
3. Select the appropriate parameters.

For this example, this report will be run for OFM's Questionable Balances each month after AFRS closes so the Fiscal Month is set to Prior. Select the format based on your preference for viewing and analyzing the results.



4. Select the Destinations

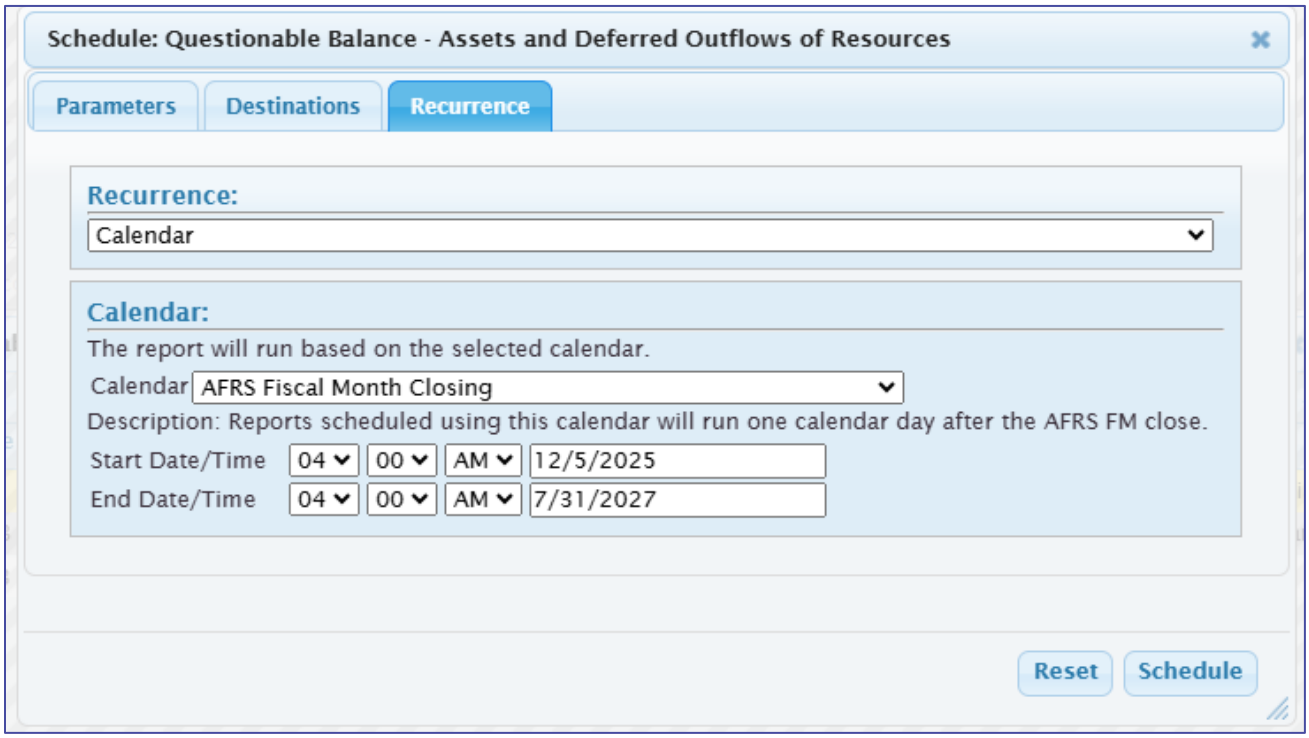
This example is based on my preference to receive an email with the report attached as a PDF, but there are several options within Enterprise Reporting.



5. **Select the Recurrence**

   The selections below will result in this report running each month after AFRS closes. At year-end, a new report will need to be scheduled that will run daily. See instructions below.

   Data is loaded into the AFRS warehouse on a nightly basis. Financial data is officially available daily from 7:00am to 8:00pm for reporting, but reports can typically be scheduled after 3:00am.



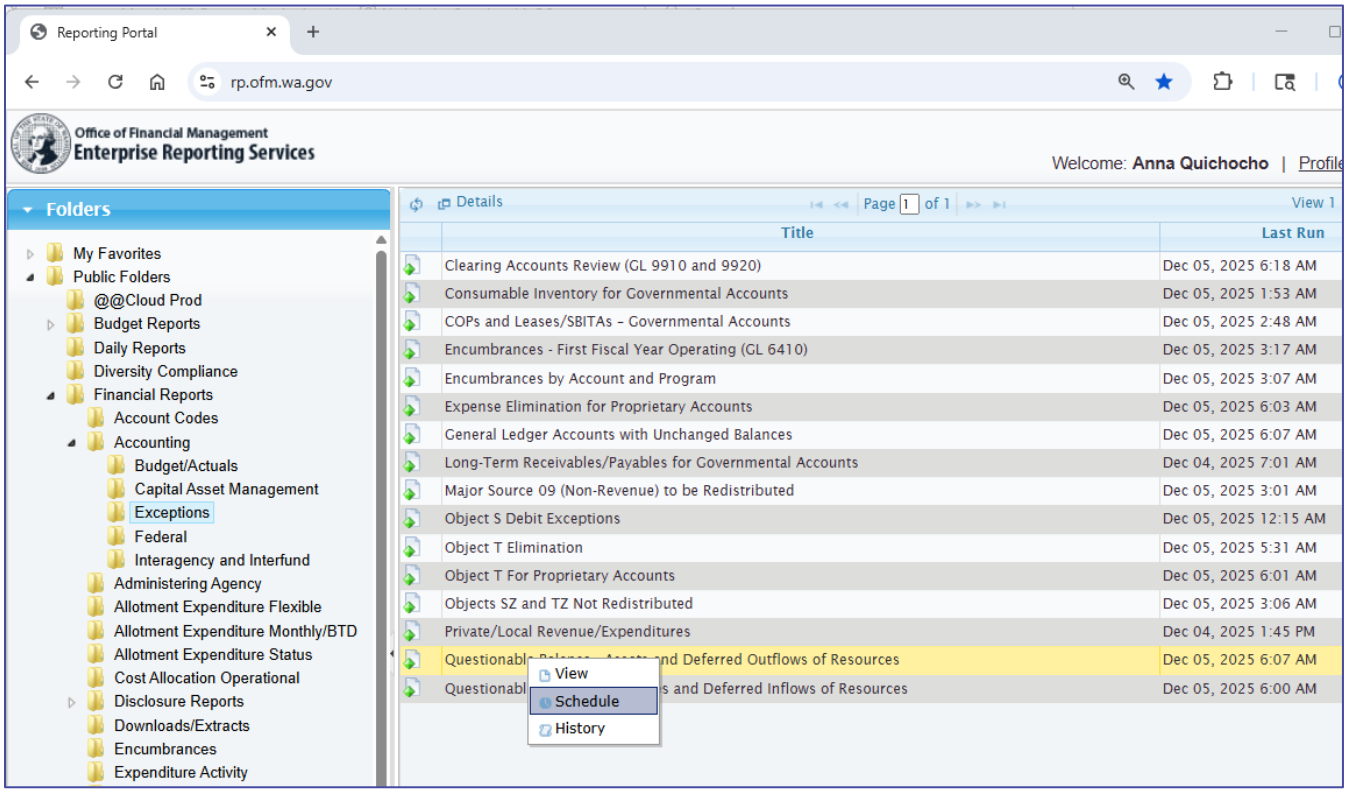
6. **Click Schedule at the bottom right.**

7. **Continue scheduling** additional exception reports.

Scheduling Reports to Run Daily at Year-End

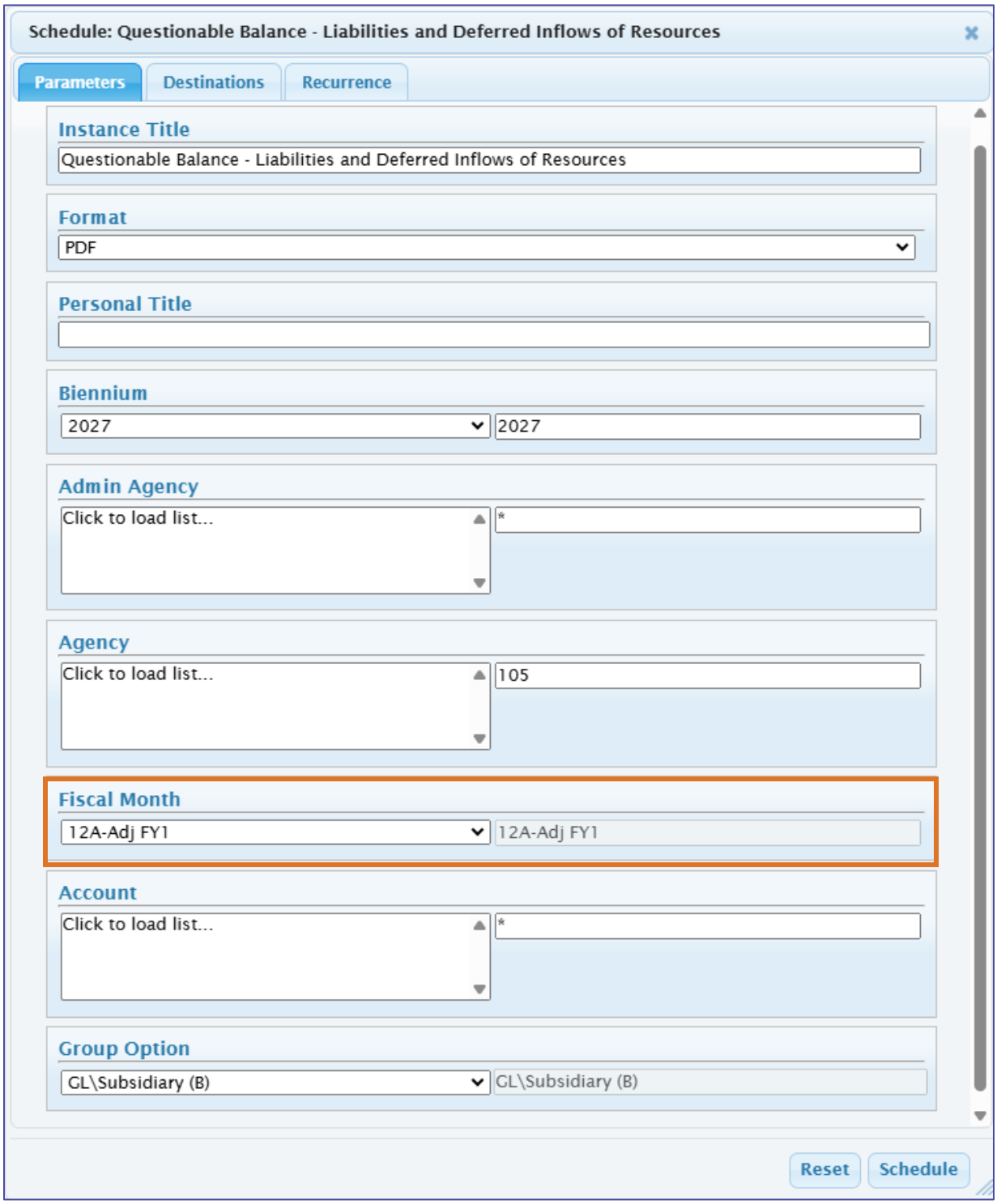
1. **Log-on to** [Enterprise Reporting]

2. **Navigate to the report** you want to schedule. **Right click** on the report title and **Select Schedule**



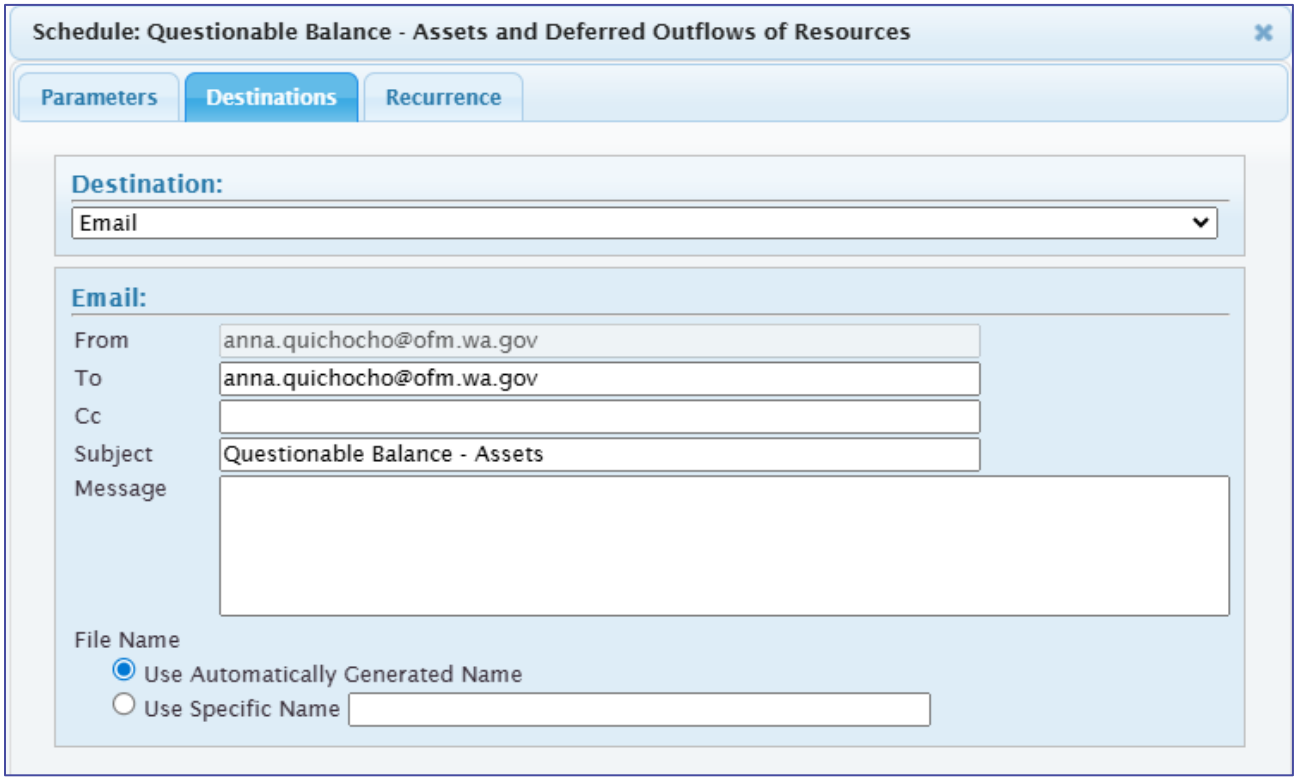
3. **Select the appropriate parameters.**

   When running the reports at year-end, the Fiscal Month should be set to either 12A or 24A to view the exceptions for the concluding fiscal year. The Format selected is based on your preference for viewing the results and what you do with the exception report after you receive it.



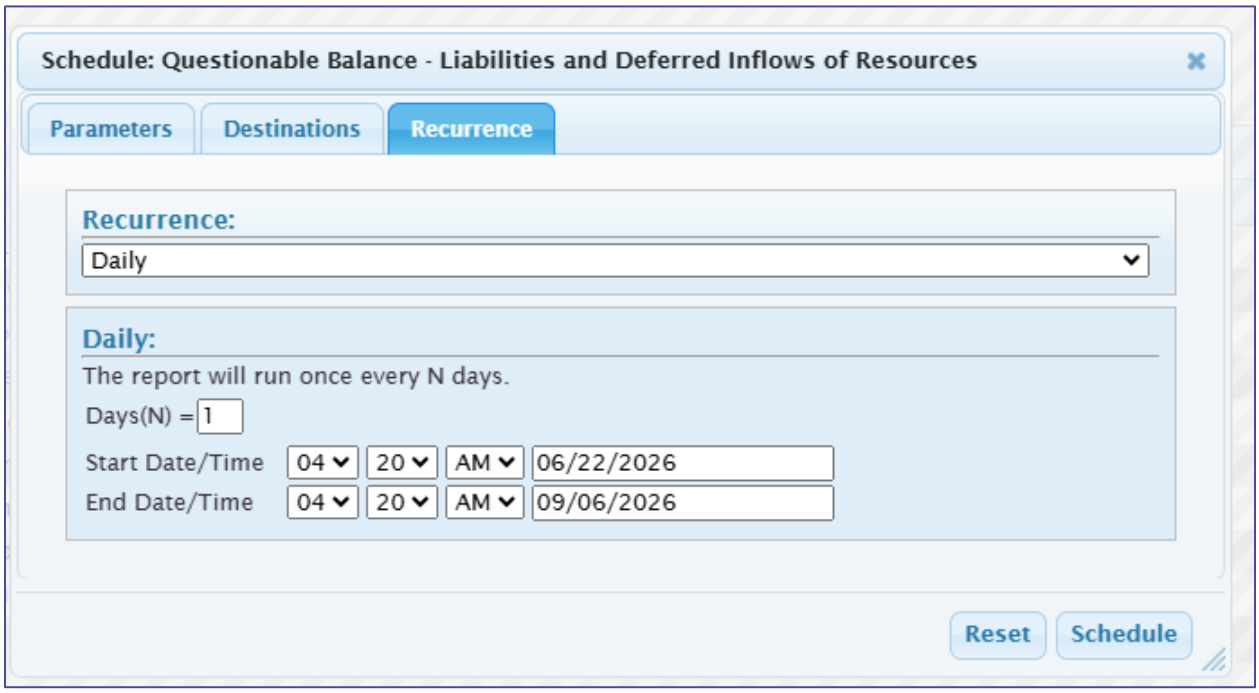
4. Select the Destinations

This example is based on my preference to receive an email with the report attached as a PDF, but there are several options within Enterprise Reporting.



5. **Select the Recurrence**

   The selections below will result in this report running daily between 6/22/2026 and 9/6/2026. The end date should be the day after Phase 2 Closes as any exceptions must be cleared by Phase 2 Close or your agency must have provided an explanation to your OFM Statewide Accountant, which they approved.



6. **Click Schedule at the bottom right.**

7. **Continue scheduling** additional exception reports.