Viewing Budgets through the Portal

Step by Step Instructions for viewing budget information on the new portal link
BUDGET REPORTS

There is now a new way to view your budget information that will give you greater access to the detail of actual transactions through the ‘Budget Reports’ link. **NOTE: The old ‘Budget Reports’ link is still accessible through the ‘Budget Reports-Old’ link.**

If you click on the link you get another link ‘Lookup GL Account Information’. Click on this link.
Once you click on the link you come to a screen where you enter the information you are interested in looking at. You can select the Full Account number, Partial Account number and Select From List tab. On the Select From List tab, there are three sections:

- **Budget Selection**: Select to view or not to view the budget with your actuals
- **Account Number Selection**: Select the account number(s) you want to view.
- **Date Range for Transactions**: Select the year, beginning period and ending period.

**NOTE**: If you have permission to more than 500 accounts, this tab will not appear for you.
BUDGET REPORTS (contd)

On the Full Account number tab, there are also three sections however the Account Number Selection lets you type in the account number or number range you want to view. Remember to use dashes in the account string.
On the Partial Account # tab, there are still the three sections but the Account Number Selection gives you the ability to enter individual components. If you enter one of the components, it will give you access to all of the strings you have permission to view.
You can then click on any of the numbers that are underlined to drill down to the detail.

At this time the detail cannot be downloaded into excel but you could copy and paste to excel if need be.
POP UP ISSUE

When in the ‘Transaction Detail’ and you want to ‘View’ the Other Transaction Information, you may get a message that the pop-up is being blocked.

You can perform the following steps to fix it:

**Internet Explorer:**

When clicking on “View”, a prompt like this will appear:

```
Internet Explorer blocked a pop-up from my.pomona.edu.   
Allow once Options for this site  
```

Either click “Allow Once” or click on “Options for this site” and then click “Always Allow”.

A prompt may appear like this:

```
To display the webpage again, the web browser needs to resend the information you've previously submitted.

If you were making a purchase, you should click Cancel to avoid a duplicate transaction. Otherwise, click Retry to display the webpage again.
```

Click on “Retry”. You will still be logged in but it will appear as you are not. Return back to the Staff page (you shouldn’t have to log in again) and click on ‘Budget Reports’. Click on “Options for this site” and then click “Always Allow”. The pop up blocker should no longer appear when logging in.
Firefox:

When clicking on “View”, a prompt like this will appear:

![Firefox popup message]

Click ‘Options’ and then click “Allow Pop Ups” and the prompt will close. You can then proceed by clicking on “View” again.

If you have any additional questions, please contact Vickie Roberts, Asst. Controller/Chief Accountant at x18276.