

Using BUDDY

Anyone with access to PeopleSoft data can use BUDDY.

Log into BUDDY at www.udel.edu/BUDDY, using your UDeNetID and password.

There are 4 tabs to view different aspects of your data.

- Main view
 - Search function
- Category view
- Account view
- Transaction view
 - Comment/tagging function
 - Query function

Main View

The main view shows a list of all the purposes (PeopleSoft's term for an "account") that you have permission to view along with their balances.

Purpose Code	Description	Balance	Viewing 2048 records	
AGCM10000	AGRICULTURAL COMMUNICATIONS	12,148.48	Click Here to Search Purposes	
AGCM112111	SES-AGRICULTURAL COMMUNICATION	12,560.16	Balances	Transactions
AGCM112112	AG COMMUNICATION EXT	28,861.00	Balances	Transactions
AGCM175111	EXTENSION PUBLICATIONS RESERVE	-4,847.08	Balances	Transactions
AGCM212111	R.E EXTENSION PUBLICATIONS	-2,055.52	Balances	Transactions
AGCM212112	R.E GARDEN CHECK	608.00	Balances	Transactions
AGCM212113	EXTENSION PUBLICATIONS-ALLOC	900.00	Balances	Transactions
AGCM212114	(D) PO CLEARING-AG COMMUNICATI	0.00	Balances	Transactions
AGCM3A2111	AFE AG COM	-312,420.74	Balances	Transactions
AGCM3A2112	AFE-PENALTY MAIL	-81,919.30	Balances	Transactions
AGCM3A2113	(D)AFE-PENALTY MAIL	-7,414.37	Balances	Transactions
AGCY912118	GENE MOD SOYDIESEL EMIS TEST P	0.00	Balances	Transactions
AGCY912123	(D)FRIENDS OF AGRICULTURE	0.00	Balances	Transactions
AGCY912126	(D)PSA MEETING	0.00	Balances	Transactions
AGCY912226	AG MEETINGS	0.00	Balances	Transactions
AGCY912281	IPA - ARAI	-6,711.03	Balances	Transactions
AGCY912287	DNLA-BUDISCHAK	8,262.58	Balances	Transactions
AGCY912312	JOINT REG SOIL TEST MTGS	298.82	Balances	Transactions
AGCY912323	AG ALUMNI ASSOC	-116.40	Balances	Transactions
AGCY912342	NE CORN IMPROVE CONF	0.00	Balances	Transactions
AGEX112111	AG ADMIN EXT	279,397.28	Balances	Transactions
AGEX112112	NEW CASTLE COUNTY EXT	44,816.89	Balances	Transactions
AGEX112113	KENT COUNTY EXT	92,908.18	Balances	Transactions
AGEX112114	SUSSEX COUNTY EXT	195,262.86	Balances	Transactions
AGEX175111	SC AGR SHORT COURSES	12,271.73	Balances	Transactions
AGEX175112	SC NEW CASTLE MASTER GARDENERS	1,144.98	Balances	Transactions
AGEX175113	SC CROP DIAGNOSTIC FIELD DAY	0.00	Balances	Transactions
AGEX175114	SC SUSSEX EXTN MTGS - NATL IS	0.00	Balances	Transactions
AGEX175114	SC SUSSEX EXTENSION MEETINGS	10,559.14	Balances	Transactions
AGEX175115	SC SELF PROGRAM SHORT COURSE	19,493.19	Balances	Transactions
AGEX175117	SC KENT COUNTY AG PROG	13,360.45	Balances	Transactions
AGEX175118	SC FOOD & NUTRITION	114.00	Balances	Transactions
AGEX175119	SC SERVE SAFE	7,201.82	Balances	Transactions
AGEX175121	SC SUSSEX MASTER GARDENERS	0.00	Balances	Transactions
AGEX175122	SC POULTRY GROWERS WORKSHOPS	0.00	Balances	Transactions
AGEX175123	SC FINANCIAL MANAGEMENT SHORT	3,040.31	Balances	Transactions
AGEX175124	SC FREC MEETINGS	25,344.20	Balances	Transactions
AGEX175125	SC VENTILATION VIDEO	0.00	Balances	Transactions
AGEX175126	SC SUSSEX CNTY FAMILY CONSUMER	14,662.52	Balances	Transactions
AGEX175128	NCC EXTENSION WORKSHOPS	0.00	Balances	Transactions
AGEX175131	BOTANIC GARDENS SUMMER WAGES	0.00	Balances	Transactions
AGEX175132	NCC 4H PROGRAM RESERVE	-13,218.25	Balances	Transactions

You can search on any part of the Purpose Code by typing your search terms in the Purpose Code search area, or search on any part of the Purpose Description by typing your search terms into the Purpose Description search area. Press Enter or select the "Click Here to Search Purposes" button.

Category View

Once you select a purpose to view, Category view shows a summary of the purpose balances broken down by Account "categories."

Account Range	Account Category	FY Budget	FY Actuals	FY Obligations	FY Balance
Expenditures					
130000- 139999	TRAVEL	0.00	518.51	0.00	-518.51
140000- 14ZZZZ	SUPPLIES AND GENERAL	0.00	5,276.16	0.00	-5,276.16
199700- 199899	TRANSFERS	0.00	-42,500.00	0.00	42,500.00
Expenditure Totals		0.00	-36,705.33	0.00	36,705.33
Grand Totals		0.00	-36,705.33	0.00	36,705.33

Account View

Clicking on the Account tab shows a summary of the purpose by individual account codes.

Account	Account Desc	Account Category	FY Budget	FY Actuals	FY Balance
Expenditures					
130100	CONFERENCES & TRAINING MEETING TRAVEL		0.00	518.51	-518.51
141000	OFFICE SUPPLIES	SUPPLIES AND GENERAL	0.00	769.92	-769.92
148400	COMPUTER SYSTEMS SOFTWARE	SUPPLIES AND GENERAL	0.00	592.88	-592.88
148500	TELEPHONE	SUPPLIES AND GENERAL	0.00	79.32	-79.32
149600	COMPUTER HARDWARE & SUPPLIES	SUPPLIES AND GENERAL	0.00	3,416.87	-3,416.87
149800	OTHER SUPPLIES&EXP	SUPPLIES AND GENERAL	0.00	417.17	-417.17
199700	TRANSFERS W/I OP/NON	TRANSFERS	0.00	-42,500.00	42,500.00
Expenditure Totals			0.00	-36,705.33	36,705.33
Grand Totals			0.00	-36,705.33	36,705.33

Transaction View

Finally, clicking on the Transaction tab shows individual transactions for the purpose.

Logged in as: WHITE,CHRISTINE SMITH

AGRI175121
CANR IT DEAN ADMIN

Year: 2008 Period: 5
Last Refreshed on:30-Oct-2007 Fund Type:OPBAL

Query

Account	Account Description	Trans Description	Trans Date	Fiscal Year	Acct Period	Amount	Obl Amount	Trans Source	Journal ID	Class	UD Chartfield	Journal Line Ref	PO Project	Comm 1	Comm 2	Comm 3
130100	CONFERENCES & TRAINING MEETING	REIMBURSEMENT	2007-10-22	2008	4	37.44	0.00	AP	AP00155378		edit			edit	edit	edit
130100	CONFERENCES & TRAINING MEETING	xfer IT chrgs	2007-09-20	2008	3	481.07	0.00	000	WEB0151778		edit	1170406		edit	edit	edit
141000	OFFICE SUPPLIES	SEARS ROEBUCK \$843	2007-09-17	2008	3	11.69	0.00	PO	GPC0151453	000	edit			edit	II	II
141000	OFFICE SUPPLIES	SUTERA DO IT BEST	2007-09-17	2008	3	4.99	0.00	PO	GPC0151453	000	edit			edit	II	II
141000	OFFICE SUPPLIES	xfer IT chrgs	2007-09-20	2008	3	22.99	0.00	000	WEB0151778		edit	1170406		edit	II	II
141000	OFFICE SUPPLIES	OFFICEMAX CT IN 759799	2007-09-17	2008	3	53.03	0.00	PO	GPC0151453	000	edit			edit	II	II
141000	OFFICE SUPPLIES	IKEA BALTIMORE	2007-09-17	2008	3	677.22	0.00	PO	GPC0151453	000	edit			edit	II	II
148400	COMPUTER SYSTEMS SOFTWARE	APL APPLEONLINESTOREUS	2007-09-19	2008	3	119.00	0.00	PO	GPC0151705	000	edit			edit	II	II
148400	COMPUTER SYSTEMS SOFTWARE	APL APPLEONLINESTOREUS	2007-09-19	2008	3	79.95	0.00	PO	GPC0151705	000	edit			edit	II	II
148400	COMPUTER SYSTEMS SOFTWARE	VMWARE INC	2007-09-17	2008	3	39.99	0.00	PO	GPC0151453	000	edit			edit	II	II
148400	COMPUTER SYSTEMS SOFTWARE	WWW.NEWEGG.COM	2007-09-17	2008	3	291.98	0.00	PO	GPC0151453	000	edit			edit	II	II
148400	COMPUTER SYSTEMS SOFTWARE	xfer IT chrgs	2007-09-20	2008	3	61.96	0.00	000	WEB0151778		edit	1170406		edit	II	II
148500	TELEPHONE	xfer IT chrgs	2007-09-20	2008	3	79.32	0.00	000	WEB0151778		edit	1170406		edit	II	II
149600	COMPUTER HARDWARE & SUPPLIES	STAPLES 00103408	2007-10-29	2008	4	27.00	0.00	PO	GPC0155918	000	edit			edit	edit	edit
149600	COMPUTER HARDWARE & SUPPLIES	WWW.NEWEGG.COM	2007-10-30	2008	4	18.06	0.00	PO	GPC0156029	000	edit			edit	edit	edit
149600	COMPUTER HARDWARE & SUPPLIES	xfer IT chrgs	2007-09-20	2008	3	205.37	0.00	000	WEB0151778		edit	1170406		edit	II	II
	COMPUTER															

These transactions can be sorted by clicking on any of the blue column headings.

Comment/tagging function

There are also four editable fields for each transaction (marked by the word edit). Just click on the word edit in any row/transaction and a small window will appear, allowing you to insert your own tag or description. Please be aware that these “tags” ONLY appear in BUDDY and do NOT appear in PeopleSoft data.

Chartfield 3:

Comment 1:

Comment 2:

Comment 3:

Query function

BUDDY has a Query function that allows you to search on any of the available columns. To get to the Query function, click on the Query link at the top of the Transaction View.

Logged in as: WHITE,CHRISTINE SMITH

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CANR IT DEAN ADMIN

Year: 2008 Period: 5
Last Refreshed on: 30-Oct-2007 Fund Type: OPBAL

[Query](#)

<u>Account</u>	<u>Account Description</u>	<u>Trans Description</u>	<u>Trans Date</u>	<u>Fiscal Year</u>	<u>Acct Period</u>	<u>Amount</u>	<u>Obl Amount</u>	<u>Trans Source</u>	<u>Journal ID</u>	<u>Class</u>	<u>UD Chartfield</u>	<u>Journal Line Ref</u>	<u>PO Project</u>	<u>Comm 1</u>	<u>Comm 2</u>	<u>Comm 3</u>
130100	CONFERENCES & TRAINING MEETING	REIMBURSEMENT	2007-10-22	2008	4	37.44	0.00	AP	AP00155378		edit			edit	edit	edit

Clicking the Query link will take you to a screen that has boxes where you can enter search criteria as below:

Transactions - Windows Internet Explorer
 http://tns.ag.udel.edu/uduv/trans.jsp?from=1400008&to=142222&bal=AGRI175121&fund=FY

Logged in as: WHITE,CHRISTINE SMITH

AGRI175121
 CANR IT DEAN ADMIN
 Year: 2008 Period: 5
 Last Refreshed on:30-Oct-2007 Fund Type:OPBAL

Search criteria boxes

Query

Account	Account Description	Trans Description	Trans Date	Fiscal Year	Acct Period	Amount	Obl Amount	Trans Source	Journal ID	Class	UD Chartfield
141000	OFFICE SUPPLIES	xfer IT chrgs	2007-09-20	2008	3	22.99	0.00 000		WEB0151778		edit 117
141000	OFFICE SUPPLIES	SUTERA DO IT BEST	2007-09-17	2008	3	4.99	0.00 PO		GPC0151453	000	edit
141000	OFFICE SUPPLIES	OFFICEMAX CT IN 759799	2007-09-17	2008	3	53.03	0.00 PO		GPC0151453	000	edit
141000	OFFICE SUPPLIES	SEARS ROEBUCK 5843	2007-09-17	2008	3	11.69	0.00 PO		GPC0151453	000	edit
141000	OFFICE SUPPLIES	IKEA BALTIMORE	2007-09-17	2008	3	677.22	0.00 PO		GPC0151453	000	edit
148400	COMPUTER SYSTEMS SOFTWARE	VMWARE INC	2007-09-17	2008	3	39.99	0.00 PO		GPC0151453	000	edit
148400	COMPUTER SYSTEMS SOFTWARE	WWW.NEWEGG.COM	2007-09-17	2008	3	291.98	0.00 PO		GPC0151453	000	edit

Just enter a search term in the box below the appropriate column heading. For example, if I wanted to search on "VMWARE" in the Trans Description field, my entry would look like this:

Transactions - Windows Internet Explorer
 http://tns.ag.udel.edu/uduv/trans.jsp?from=1400008&to=142222&bal=AGRI175121&fund=FY

Logged in as: WHITE,CHRISTINE SMITH

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 CANR IT DEAN ADMIN
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"VMWARE" in Trans Description search box

Query

Account	Account Description	Trans Description	Trans Date	Fiscal Year	Acct Period	Amount	Obl Amount	Trans Source	Journal ID	Class	UD Chartfield
141000	OFFICE SUPPLIES	xfer IT chrgs	2007-09-20	2008	3	22.99	0.00 000		WEB0151778		edit 117
141000	OFFICE SUPPLIES	SUTERA DO IT BEST	2007-09-17	2008	3	4.99	0.00 PO		GPC0151453	000	edit
141000	OFFICE SUPPLIES	OFFICEMAX CT IN 759799	2007-09-17	2008	3	53.03	0.00 PO		GPC0151453	000	edit
141000	OFFICE SUPPLIES	SEARS ROEBUCK 5843	2007-09-17	2008	3	11.69	0.00 PO		GPC0151453	000	edit
141000	OFFICE SUPPLIES	IKEA BALTIMORE	2007-09-17	2008	3	677.22	0.00 PO		GPC0151453	000	edit
148400	COMPUTER SYSTEMS SOFTWARE	VMWARE INC	2007-09-17	2008	3	39.99	0.00 PO		GPC0151453	000	edit
148400	COMPUTER SYSTEMS SOFTWARE	WWW.NEWEGG.COM	2007-09-17	2008	3	291.98	0.00 PO		GPC0151453	000	edit
148400	COMPUTER SYSTEMS SOFTWARE	xfer IT chrgs	2007-09-20	2008	3	61.96	0.00 000		WEB0151778		edit 117
148400	COMPUTER SYSTEMS SOFTWARE	APL APPLEONLINESTOREUS	2007-09-19	2008	3	79.95	0.00 PO		GPC0151705	000	edit
148400	COMPUTER SYSTEMS SOFTWARE	APL APPLEONLINESTOREUS	2007-09-19	2008	3	119.00	0.00 PO		GPC0151705	000	edit
148400	COMPUTER SYSTEMS SOFTWARE	ASAP EXPR LBX 95414	2007-11-07	2008	5	124.12	0.00 PO		GPC0156831	000	edit
148500	TELEPHONE	xfer IT chrgs	2007-09-20	2008	3	79.32	0.00 000		WEB0151778		edit 117
149600	COMPUTER HARDWARE & SUPPLIES	WWW.NEWEGG.COM	2007-10-03	2008	4	144.46	0.00 PO		GPC0153322	000	edit
149600	COMPUTER HARDWARE & SUPPLIES	APL APPLEONLINESTOREUS	2007-10-08	2008	4	2,328.00	0.00 PO		GPC0153666	000	edit
149600	COMPUTER HARDWARE & SUPPLIES	PARTS EXPRESS	2007-09-17	2008	3	106.82	0.00 PO		GPC0151453	000	edit
149600	COMPUTER HARDWARE & SUPPLIES	xfer IT chrgs	2007-09-20	2008	3	205.37	0.00 000		WEB0151778		edit 117
149600	COMPUTER HARDWARE & SUPPLIES	WWW.NEWEGG.COM	2007-09-17	2008	3	36.83	0.00 PO		GPC0151453	000	edit
149600	COMPUTER HARDWARE & SUPPLIES	xfer software chrg	2007-09-19	2008	3	-36.83	0.00 000		WEB0151634		edit 116
149600	COMPUTER HARDWARE & SUPPLIES	APL APPLEONLINESTOREUS	2007-11-06	2008	5	69.00	0.00 PO		GPC0156714	000	edit

Once I click enter, BUDDY would return the following results:

Transactions - Windows Internet Explorer

http://tns.ag.udel.edu/udluy/trans.jsp?bal=AGRI175121&fund=FY8nacct=&acctdesc=&tran_desc=VMWARE&ntran=&xtran=&year=&acctper=&transrc=&jid=&class=

File Edit View Favorites Tools Help

Main Balances Transactions Logout

Logged in as: WHITE,CHRISTINE SMITH

AGRI175121
CANR IT DEAN ADMIN

Year: 2008 Period: 5
Last Refreshed on: 30-Oct-2007 Fund Type: OPBAL

[Query](#)

Account	Account Description	Trans Description	Trans Date	Fiscal Year	Acct Period	Amount	Obl Amount	Trans Source	Journal ID	Class	UD Chartfield	Journal Line Ref	PO Project	Comm 1	Comm 2	Comm 3
148400	COMPUTER SYSTEMS SOFTWARE	VMWARE INC	2007-09-17	2008	3	39.99	0.00	PO	GPC0151453	000	edit			edit	II	II
Totals						39.99	0.00									