Deleting Budget Journals

This training guide describes the process for deleting journals that have not been posted to a KK ledger. Journals may be deleted one-at-a-time from the journal lines page or in mass using the mass delete process.

Before you begin . . .

Upon completion of this guide you will be able to:
- Delete a budget journal that has not been posted

How do I sign in to PeopleSoft?
1. Sign in to the NUPortal at nuportal.northwestern.edu
2. Click the Staff tab, Finance and Budget tab, and then click the Login to PeopleSoft link from the left navigation pane.

Who has access?
Budget Office

Additional Resources
- Visit the Project Café website for additional training materials www.cafe.northwestern.edu/training
- Visit the Project Café website for the Chart of Accounts Quick Reference Guide www.cafe.northwestern.edu/coa
- Visit the NUPortal nuportal.northwestern.edu to access the Chart of Accounts crosswalk.
- To access NU budget policies, visit the NUPortal nuportal.northwestern.edu. Click the Staff tab, and then the Finance and Budget tab. Locate the Create Budget Journal Search area. Click the Review Policy link.

Where do I get help?
For assistance, contact NUIT Support Center at 847-491-HELP (4357) or e-mail consultant@northwestern.edu.
Deleting Budget Journals **From the Journal Lines Page**

The simplest way to delete a single budget journal is from the Process menu within the budget journal.

1. From the Menu panel, click **Commitment Control → Budget Journals → Enter Budget Journals**.
2. Search for the journal, and then click the Journal ID to open it.
3. Click the **Lines** tab, and then select **Delete** from the Process menu.
4. Click **Process**, and then follow the prompts.

Deleting Budget Journals **Using Mass Delete**

This process is used to delete one or more budget journals from a KK ledger. Only journals which have not been posted may be deleted. Deleted journals are purged from the system. Deleted journals do not appear on reports.

**Step 1: Find the journal you want to delete**

Quick Navigation: From the Menu panel, click **Commitment Control → Budget Journals → Mass Delete Budget Journals**.

1. Select the ledger the journal was entered into.
2. Enter the Journal ID if you know it, otherwise, enter the date range in which the journal was created.
3. Select a ChartField, and then enter a value to narrow the results such that only journals containing the value are returned. This is optional. Click **Search**.
4. Select the journal you want to delete. You can also click **Show Jrl** to see the journal.
5. Click **Delete**.
Step 2: Confirm that it is OK to delete the journal

1. Click OK

Step 3: Verify that the journal was deleted

1. Enter the ID number of the journal you deleted.
2. Click Search.

This message confirms that the journal was deleted.
In a Nutshell . . .

Process Overview

Deleting Budget Journals *Using the Process Menu*
The simplest way to delete a single budget journal is from the Process menu within the budget journal.
Step 1: From the Menu panel, click Commitment Control → Budget Journals → Enter Budget Journals.
Step 2: Search for the journal, and then click on the Journal ID to open it.
Step 3: Click the Lines tab, and then select Delete from the Process menu.
Step 4: Click Process, and then follow the prompts.

Deleting Budget Journals *Using Mass Delete*
Step 1: Find the journal you want to delete
    Commitment Control → Budget Journals → Mass Delete Budget Journals
Step 2: Confirm that it is OK to delete the journal
Step 3: Verify that the journal was deleted