

CHANGE STATUS OF BILL & FINALIZE & PRINT BILL

CHANGE STATUS OF BILL



*** Note: Bill must be in Ready (RDY) status prior to running the finalize and print process**

1. Navigate to Billing > Locate Bills > Bills Not Invoiced – to find the bill number
2. Enter customer “FED015” and click

Header - Info 1
Line - Info 1

Unit: DOTM1 Invoice: FED09058

Status:

*Type:

*Customer: [Address](#)

Federal Highway Administration (FHWA)

Cycle ID:

Pay Terms:

Accounting Date:

Sales:

Credit:

Pretax Amt: 5,668,891.18 USD

Invoice Date:

Source:

*Frequency:

SubCust1:

SubCust2:

From Date:

To Date:

Pay Method:

Account:

Bill Inquiry Phone:

Collect:

Curr: USD

[Installment Bill Schedule](#)

[Recurring Bill Schedule](#)

Remit To:

Bank Account:

[AR Distribution](#)

Bill:

Billing Authority:

Go to: [Header Info 2](#) [Address](#) [Copy Address](#) [Notes](#) [Express Entry](#)

[Summary](#) [Bill Search](#) [Line Search](#)

Navigation:

Header - Info 1 | [Line - Info 1](#)

Figure 1 – This is a sample of the Bill with the “NEW” Status

3. Look for Bill with “New” status and source of “Projects”
4. Note the Invoice number of the bill you need to change the status of.
5. Navigate to *Billing > Maintain Bills>Change Status of Bills*

Bill Status Change
 Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

Run Control ID:

Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Figure 2 – This is the Bill Status Change run control page

- 6. Click **Search** for an existing run control or create a new run control

Status Change

Run Control ID: [Report Manager](#) [Process Monitor](#) **Run**

Language:

From Status	To Status
<input checked="" type="checkbox"/> New <input type="checkbox"/> Hold <input type="checkbox"/> Pending <input type="checkbox"/> Ready <input type="checkbox"/> Canceled	*New Bill Status: <input type="text" value="Ready Bill"/>

Range Selection	Other Options
<input type="radio"/> All <input type="radio"/> Bill Cycle <input type="radio"/> Start Add <input type="radio"/> Range ID <input type="radio"/> Copy Group ID <input checked="" type="radio"/> Invoice ID <input type="radio"/> Cust ID <input type="radio"/> Bill Type <input type="radio"/> Bill Source	<input type="checkbox"/> Include Consolidation Group *Business Unit: <input type="text" value="DOTM1"/> From Invoice: <input type="text" value="FED09058"/> To Invoice: <input type="text" value="FED09058"/>

Save **Notify** **Add** **Update/Display**

Figure 3 – Status Change options page


- 7. Change the From Status option to “New”.
- 8. Change the To Status option to “Ready Bill” (select from drop down)
- 9. Change Range Selection option to “Invoice ID”

10. Enter Business Unit “DOTM1”. And enter the invoice number of the bill you wish to change the status from “New” to “RDY”.


11. Click **Run** to process the run control to change the status from New Bill to Ready Bill

Process Scheduler Request



User ID: HoangV Run Control ID: Bill_chang_status

Server Name: Run Date: 10/12/2007 

Recurrence: Run Time: 11:27:52AM **Reset to Current Date/Time**

Time Zone: 

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Invoice Status Change	BIIVCSTS	SQR Report	Web 	PDF 	Distribution

OK **Cancel**

Figure 4 – Process Scheduler Request page

12. Click **OK** to process

Status Change

Run Control ID: Bill_chang_status [Report Manager](#) [Process Monitor](#)

Language:

Process Instance: 9386

From Status

New Ready
 Hold Canceled
 Pending

To Status

*New Bill Status:

Range Selection

All Invoice ID
 Bill Cycle Cust ID
 Start Add Bill Type
 Range ID Bill Source
 Copy Group ID

Include Consolidation Group

*Business Unit:

From Invoice:

To Invoice:

Figure 5 – Note process instance number

13. The Status Change page displays with a Process Instance number

14. Click on [Process Monitor](#) link. The Process List page displays.

Process List [Server List](#)

View Process Request For

User ID: Type: Last: Days

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	9386		SQR Report	BIIVCSTS	HoangV	10/12/2007 11:27:52AM EDT	Success	Posted	Details

[Go back to Bill Status Change](#)

[Process List](#) | [Server List](#)

Figure 6 – Process List page

15. Click on Details link to view message log

Process Detail

Process			
Instance:	9386	Type:	SQR Report
Name:	BIIVCSTS	Description:	Invoice Status Change
Run Status:	Success	Distribution Status:	Posted

Run	Update Process
Run Control ID: Bill_chang_status Location: Server Server: PSNT Recurrence:	<input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input type="radio"/> Delete Request <input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 10/12/2007 11:28:26AM EDT Run Anytime After: 10/12/2007 11:27:52AM EDT Began Process At: 10/12/2007 11:28:41AM EDT Ended Process At: 10/12/2007 11:28:53AM EDT	Parameters Transfer Message Log Batch Timings View Log/Trace

OK Cancel

Figure 7– Process Detail page

16. Click on Message Log link to view message log

Message Log

Process			
Instance:	9386	Type:	SQR Report
Name:	BIIVCSTS	Description:	Invoice Status Change

Customize | Find | View All | First 1-3 of 3 Last

Severity	Log Time	Message Text	Explain
10	11:28:42AM	Successful	Explain
	11:28:55AM	Published message with Pub ID of 697865 to request to have report added in folder CF8R	Explain
	11:28:55AM	Successfully posted generated files to the report repository	Explain

Return

Figure 8 – Message Log page

* NOTE: You can also go to viewlog/trace and open .PDF file

FINALIZE & PRINT BILL



Header - Info 1 | Line - Info 1

Unit: DOTM1 Invoice: FED09058 Pretax Amt: 5,668,891.18 USD

Status: Invoice Date: Curr: USD

*Type: Source: *Frequency: [Installation Bill Schedule](#)
[Recurring Bill Schedule](#)

*Customer: [Address](#) SubCust1:
 Federal Highway Administration (FHWA) SubCust2:

Cycle ID: *Invoice Form: From Date: To Date:

Pay Terms: Pay Method: Remit To: Bank Account:

Accounting Account: [AR Distribution](#)

Date: Sales: Bill Inquiry Phone: Billing Authority:

Credit: Collect: Biller:

Go to: [Header Info 2](#) [Address](#) [Copy Address](#) [Notes](#) [Express Entry](#) [Page Series](#)


[Summary](#) [Bill Search](#) [Line Search](#) Navigation: [Prev](#) [Next](#)

Header - Info 1 | Line - Info 1

Figure 9 – This is the sample of the Bill set to “RDY” status



17. Navigate to: *Billing > Generate Invoices > Non-Consolidated > Finalize and Print Invoices*
18. Click for an existing run control or create a new run control
19. Change Range Select to “Invoice ID”. Input Business Unit and invoice number

Finalize and Print | **Print Options**

Run Control ID: Finalize_print Report Manager Process Monitor **Run** 

Language: English Specified Recipient's

Selection Parameters Find | View All First 1 of 1 Last



Seq Nbr: 1 *EDI Invoice Options: Print Only  


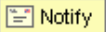


Invoice Date Option

Processing Date User Defined

Range Selection


All Invoice ID
 Bill Cycle Cust ID
 Date Bill Added Bill Type
 Range ID Bill Source

From Business Unit: DOTM1 
To Business Unit: DOTM1 
From Invoice: FED09058
To Invoice: FED09058


   

[Finalize and Print](#) | [Print Options](#)

Figure 10 – This is the detail run control page


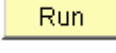
20. Click on  icon to view bills to be processed

Bills To Be Processed

Customize | Find | View All |  First 1 of 1 Last

BI Unit	Invoice	Status	Customer	Inv Layout	Layout Type	Bill To Media
DOTM1	FED09058	RDY	FED015	PORTRAIT	P	P

Figure 11 – Bills to be processed page

21. Click  to go back to finalize and print page
22. Click , select “Finalize and Print” and click OK

Process Scheduler Request

User ID: HoangV Run Control ID: Finalize_print

Server Name: [Dropdown] Run Date: 10/12/2007 [Calendar]

Recurrence: [Dropdown] Run Time: 1:15:11PM [Reset to Current Date/Time]

Time Zone: [Dropdown]

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Pre-process & Finalization	BIIVC000	Application Engine	Web	TXT	Distribution
<input type="checkbox"/>	Print Portrait Invoices	BIIVCPN	SQR Report	Web	PDF	Distribution
<input checked="" type="checkbox"/>	Finalize and Print	BIJOB01	PSJob	(None)	(None)	Distribution
<input type="checkbox"/>	Landscape summarize Invoices	BISLSUM	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Invoice Extract Process	BI_IVCEXT	Application Engine	Web	TXT	Distribution

OK Cancel

Figure 12 – Process Scheduler Request page

23. The Finalize and Print page displays with a Process Instance number

Finalize and Print | [Print Options](#)

Run Control ID: Finalize_print [Report Manager](#) [Process Monitor](#) **Run** [Menu]

Language: English [Dropdown] Specified Recipient's

Process Instance: 9387

Selection Parameters Find | View All First 1 of 1 Last

Seq Nbr: 1 *EDI Invoice Options: Print Only [Dropdown]

Invoice Date Option
 Processing Date User Defined

Range Selection
 All Invoice ID
 Bill Cycle Cust ID
 Date Bill Added Bill Type
 Range ID Bill Source

From Business Unit: DOTM1 [Search]
 To Business Unit: DOTM1 [Search]
 From Invoice: FED09058
 To Invoice: FED09058

Save Notify Add Update/Display

[Finalize and Print](#) | [Print Options](#)

Figure 13 – Note the Process Instance numbers

24. Click on [Process Monitor](#) link. The Process List page displays

25. Click **Refresh** until the Run Status is Success and the Distribution Status is Posted for your process instance number.

The screenshot shows the 'Process List' tab in a software interface. At the top, there are tabs for 'Process List' and 'Server List'. Below them is a 'View Process Request For' section with search filters for User ID (HoangV), Type, Last (1 Days), Server, Name, Instance, Run Status, and Distribution Status. A 'Refresh' button is highlighted with a red circle. Below the filters is a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	9387		PSJob	BIJOB01	HoangV	10/12/2007 1:15:11PM EDT	Success	Posted	Details
<input type="checkbox"/>	9386		SQR Report	BIIVCSTS	HoangV	10/12/2007 11:27:52AM EDT	Success	Posted	Details

Below the table, there is a link 'Go back to Finalize And Print', 'Save' and 'Notify' buttons, and navigation links 'Process List | Server List'.

Figure 14 – Process Scheduler Request page


26. Click [BIJOB01](#) process name link to view process detail page





Process Detail

Process Name: BIJOB01 [Refresh](#)

Main Job Instance: 9387

Left | Right

 [9387 - BIJOB01 Success](#)

-  [9388 - BIIVC000 Success](#)
-  [9389 - BI_IVCEXT Success](#)
-  [9390 - BISLSUM Success](#)
-  [9391 - BIIVCFIN Success](#)

[Return](#)

Figure 15 – Process Detail page

27. Click on [BISLSUM Success](#) link

Process Detail	
Process	
Instance: 9391	Type: SQR Report
Name: BIIVCPN	Description: Print Portrait Invoices
Run Status: Success	Distribution Status: Posted
Run	Update Process
Run Control ID: Finalize_print	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSNT	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request
Date/Time	Actions
Request Created On: 10/12/2007 1:15:24PM EDT	Parameters Transfer
Run Anytime After: 10/12/2007 1:15:11PM EDT	Message Log
Began Process At: 10/12/2007 1:19:44PM EDT	Batch Timings
Ended Process At: 10/12/2007 1:19:57PM EDT	View Log/Trace
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

Figure 16 – Process Detail page

28. Click on [View Log/Trace](#) link

View Log/Trace

Report

Report ID: 7827 **Process Instance:** 9391 [Message Log](#)
Name: BIIVCPN **Process Type:** SQR Report
Run Status: Success

Print Portrait Invoices

Distribution Details

Distribution Node: TPRRPTFTP **Expiration Date:** 11/15/2008

File List

Name	File Size (bytes)	Datetime Created
BIIVCPN_9391.PDF	3,655	10/12/2007 1:19:57.000000PM EDT
BIIVCPN_9391.out	73,533	10/12/2007 1:19:57.000000PM EDT
SQR_BIIVCPN_9391.log	1,724	10/12/2007 1:19:57.000000PM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	HoangV

Figure 17 – This is the view log/trace page

29. Click on [BIIVCPN PDF](#) link to view/print invoice

INVOICE

Please Remit To:

State of Connecticut
 Department of Transportation - Accounts Receivable Unit
 P.O. Drawer 317546
 2800 Berlin Turnpike
 Newington CT 06131-7546
 United States

Page: 1
 Invoice No: FED09058
 Invoice Date: 10/12/2007
 Customer Number: FED015
 Payment Terms: Immediate
 Due Date: 10/12/2007
 PO:

Bill To:

Federal Highway Administration (FHWA)
 628-2 Hebron Avenue
 Suite 303
 Glastonbury CT 06033-5007
 United States

AMOUNT DUE: 5,668,891.18 USD



Amount Remitted

For billing questions, please call (860) 594-2298

Line	Adj	Identifier	Description	Quantity	UOM	Unit Amt	Net Amount
1		FED_45020	CAB, 6/28-6/30/07,SUPPLEMENTAL	1.00	EA	5,574,544.96	5,574,544.96
2		FED_45020	CAB, 6/28-6/30/07,SUPPLEMENTAL	1.00	EA	10,378.60	10,378.60
3		FED_45020	CAB, 6/28-6/30/07,SUPPLEMENTAL	1.00	EA	83,967.62	83,967.62
SUBTOTAL:							5,668,891.18
TOTAL AMOUNT DUE :							5,668,891.18

Figure 18 – This is the Invoice Sample.