Civic Systems
17th Annual Symposium
Session Descriptions

Sessions have been broken down into three (3) different tracks – Financial – Clarity, Utility Billing and Misc. – Clarity, and New User – Clarity. The following is a description of each session and the sessions being provided in all three (3) tracks.

Financial – Clarity sessions

General Ledger Reporting

Thursday: 10:00 – 11:00

Learn how to get the most out of reports, financial statements, and table lists within the General Ledger module. This session will explore using the powerful reporting tools that are available such as exporting reports to Excel and adding or removing columns on a canned report.

Advanced Payroll

Thursday: 10:00 – 11:00

Advanced payroll topics will be discussed during this session. We will review transmittals, supplemental checks, tracking benefits, understanding pay code setup, and much more will be discussed in detail to help you better manage the Payroll module.

miExcel General Ledger, Accounts Payable, and Payroll

Thursday: 11:15 – 12:15

Review and explore the Excel add-in for General Ledger, Account Payable, and Payroll. Learn how it can help you with financial reporting and budgeting in the General Ledger. This class will show you how to import a budget or journal entries directly from Excel. In addition, learn how to get information related to vendors along with importing invoices and manual checks. Finally, learn how to use miExcel's custom functions to pull payroll information directly into your spreadsheet and how to import time.

Bank Reconciliation Tips and Tricks

Thursday: 11:15 – 12:15

This session is designed to assist with the details of the monthly bank reconciliation process. Learn how to reconcile receipts and disbursements, understanding adjustments, comparing the reconciled balance to the general ledger and proofing cleared totals to your bank statement. If time permits, we will discuss the proper handling of reserve accounts.

miPayOnline and Remote Time Entry

Thursday: 1:30 – 2:30

This session will cover how you can provide access to payroll checks and W-2's to your employees online. In addition, we will review the new capabilities of remote time entry and time off requests through the miPayOnline portal.

(**Financial – Clarity sessions – continued**)

Tips and Tricks

Thursday: 1:30 – 2:30

Join us if you need a refresher or want to learn fun tips and tricks. We will walk you through modifying your steps checklist, creating user-defined fields, modifying search screens, history tracking, system management, and much more. Examples will be centered on financial modules.

Budgeting

Thursday 2:45 – 3:45

Review and explore the budgeting features in the General Ledger. This class will assist you in preparing and tracking budgets. We will cover topics such as: Enter Budget Amounts, Import Amounts, Budget Journals, and monitoring the budget.

Question and Answer

Thursday: 2:45 – 3:45

This session provides users a guided forum to share ideas and ask questions with regards to the financial suite (i.e. Accounts Payable, Accounts Receivable, General Ledger, Cash Receipting, etc.). This session relies heavily on attendee questions and interaction. Please submit a questions We will review frequently asked questions and encourage customers electing to attend this session to submit at least one question two weeks prior to attending the Symposium. You will have the opportunity to submit a question while registering or you may email support@civicsystems.com with “Question and Answer Session” in the subject line. If time permits, a portion of the session will be open for any additional general questions.

Managing Capital Projects and Grants

Thursday: 2:45 – 3:45

This session will cover how to use the different tools within the software to track your capital projects. We will go through how to account for project costs in the various modules and the reports available to track how much each project costs. In addition, we will cover how to track grants in a similar fashion.

Payroll Reporting

Friday: 8:30 – 9:30

Learn how to get the most out of reports and table lists within Payroll. This session will explore using the powerful reporting tools that are available such as exporting reports to Excel, adding or dropping columns on a canned report, and creating a table list report.

Troubleshooting Checkout – General Ledger and Accounts Receivable

Friday: 8:30 – 9:30

Learn how to clean-up your Checkout. This session will concentrate on the General Ledger and Accounts Receivable modules. We will cover what checkout issues commonly appear and how to rectify those issues.

miViewPoint and Accounts Payable Workflow

Friday: 9:45 – 10:45

This session will cover the departmental portal called miViewPoint. miViewPoint provides access to department heads to view their accounts, invoices, and employees. In addition, we will cover the Accounts Payable workflow capabilities. These capabilities give you the ability to scan invoices and route them for approval to the various departments. If you are looking to streamline your AP process, don’t miss this session.

(**Financial – Clarity sessions** – **continued)**

Accounts Payable and Accounts Receivable Reporting

Friday: 9:45 – 10:45

Learn how to get the most out of reports and table lists within the Accounts Payable and Accounts Receivable modules. This session will explore using the powerful reporting tools that are available such as exporting reports to Excel and adding or removing columns on a canned report.

Balancing Cash Clearing and Other Accounts

Friday: 11:00 – 12:00

This session will go over how cash clearing accounts work and how to troubleshoot if they are not clearing out. In addition, we will review what other accounts you should be reconciling at month end and which reports will help you in making sure these accounts are accurate.

Troubleshooting Checkout – Payroll and Accounts Payable

Friday: 11:00 – 12:00

Learn how to clean-up your Checkout. This session will concentrate on the Payroll and Accounts Payable modules. We will cover what checkout issues commonly appear and how to rectify those issues.

Utility Billing and Misc. – Clarity sessions

Meter Management

Thursday: 10:00 – 11:00

We will review the timing of when to do meter change outs, modifying meters, setting up solar meters, multiple meters and other meter management activities. In addition, we will review tools you can utilize to track meter testing and importing meter change outs from Excel.

Cash Receipting and Online Payments

Thursday: 10:00 – 11:00

Cash Receipting efficiently records daily payments, transfers, and deposits for cash, checks, and credit cards. This session will review category and distribution setup along with payment type, recording NSF's, and balancing your cash drawer. It will also encompass daily deposits and online payments with respect to reconciling these to your bank statement.

Utility Billing Reporting

Thursday: 11:15 – 12:15

Learn how to get the most out of reports and table lists. This session will explore using the powerful reporting tools that are available, such as exporting reports to Excel and adding or dropping columns on a canned report.

Question and Answer – WI Utilities

Thursday: 11:15 – 12:15

We will review Utility Management processes that customers most frequently ask. The Wisconsin Public Service Commission has many regulations. We will entertain questions specific to the state of Wisconsin and other general utility billing related questions. **Customers electing to attend this session are asked to submit at least one question that they would like to have answered**. If time permits, we will reserve a portion of the session for open questions.

(Utility Billing and Misc. – Clarity sessions – continued)

Advanced Utility Billing I

Thursday: 1:30 – 2:30

Advanced Utility Billing topics will be discussed during this session. Customer inquiry, bank setup, stop billing a service, collection codes, transferring information to a new account at final billing. In addition, we will cover how to use some reports such as balancing the sales tax report, utilizing the consumption analysis report, location report and more. Attend this session to help you better manage the Utility Billing module.

Building Permits, Code Enforcement, and Business Licenses

Thursday: 1:30 – 2:30

Learn how to easily process building permits, manage inspections, import and update property information from electronic files, and record and track information based on each permit type. Code Enforcement will create inspection schedules and checklists, easily escalate tracked complaints to violations, charge fees, issue notices and schedule inspections for violations. Business Licenses will help you manage your municipality's alcohol, operators, etc. licenses.

Advanced Utility Billing II

Thursday: 2:45 – 3:45

Advanced Utility Billing topics will be discussed during this session. Master contacts, payment allocation, managing budget customers, reallocate credit balances, and billing meters, customer inquiry, managing budget customers, reallocate credit balances, and adjustments (billing, payment, and write-off) will be discussed in detail to help you better manage the Utility Billing module.

Creating/Editing Forms and Outsource Bill Print

Friday: 8:30 – 9:30

Lean how to create and edit the different forms that are available in the utility billing modules such as utility bills, delinquent notices, shutoff notices, and custom letters. In addition, we will review options for outsourcing your bill printing. Things to consider when you get a new PC and/or new printer.

Tax Certification

Friday: 8:30 – 9:30

This class will review the Tax Certification process including walk you through the setup of the tax certification program, creating your customer letters, applying the penalty and sending the information to the tax district.

Question and Answer – IA, IL, MI, MN

Friday: 9:45 – 10:45

We will review Utility Management processes that customers most frequently ask about. This session is specifically geared towards utility questions specific to the states of Iowa, Illinois, Michigan, and Minnesota. **Customers electing to attend this session are asked to submit at least one question that they would like to have answered**. You will have the opportunity to submit a question while registering or you may email support@civicsystems.com with "Question and Answer Session" in the subject line. If time permits, we will reserve a portion of the session for open questions.

(Utility Billing and Misc. – Clarity sessions – continued)

Tips and Tricks
Friday: 9:45 – 10:45

Join us if you need a refresher or want to learn fun tips and tricks related to the Clarity software. We will walk you through modifying your steps checklist, creating user-defined fields, modifying search screens, history tracking, system management, and much more. Examples will be centered on utility billing modules.

Service Orders
Friday: 11:00 – 12:00

The Service Orders module assists with better communication with the meter department and provides you with the ability to track anything being done at a service location or with a meter. We will also be reviewing our remote service order mobile application. Join us for an overview on how this module can help your office be more efficient and effective.

Utility Billing Reporting *(repeat)*
Friday: 11:00 – 12:00

Learn how to get the most out of reports and table lists. This session will explore using the powerful reporting tools that are available, such as exporting reports to Excel and adding or dropping columns on a canned report. This session is also presented at 11:15 a.m. on Thursday

New User – Clarity

We have added a number of sessions to help the new employee who has not received formal training on Clarity. These classes can also be a good review for those that have been using the software for some time. Each session will hit on more of the **basics** in each module. Please note that some of these sessions span two sessions.

Clarity Accounts Payable – New User
Thursday: 10:00 – 11:00

Clarity General Ledger – New User
Thursday: 11:15 – 12:15

Clarity Payroll – New User *(double session)*
Thursday: 1:30 – 3:45

Clarity Accounts Receivable – New User
Friday: 8:30 – 9:30

Clarity Utility Billing – New User *(double session)*
Friday: 9:45 – 12:00