

Civic Systems

18th Annual Symposium

Session Descriptions

Sessions have been broken down into four (4) different tracks – Financial, Utility Billing, Miscellaneous, and New User. The following is a description of each session and the sessions being provided in all four (4) tracks.

Financial sessions

miViewPoint and Accounts Payable Workflow

Thursday: 10:00 – 11:00

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.

What's New in Connect

Thursday: 10:00 – 11:00

Learn about the enhancements and changes in the new version called Connect. We will cover enhancements like the new drill-down features and the new report writer. In addition, we cover changes to enter invoices, positions in payroll, and several inquiry screens.

Balancing Utility Billing to the General Ledger

Thursday: 10:00 – 11:00

This session will provide an in-depth look at the relationship between General Ledger and Utility Management. We will review how General Ledger accounts are assigned in Utility Management and which take precedence between rates and services. Learn steps for balancing between Utility Management and General Ledger including the cash clearing account. Explore what entries are created in the General Ledger and which journal codes are used to create those entries.

miPayOnline and Remote Time Entry

Friday: 11:15 – 12:30

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 capabilities of remote time entry and time off requests through the miPayOnline portal.

Preparing for Audit

Thursday: 1:45 – 3:00

This session will concentrate on the things you need to do in order to be ready for your auditors. We will discuss topics such as useful reports, internal controls, what an auditor expects when doing your audit, and more.

(Financial sessions – continued)

Advanced Payroll

Thursday: 1:45 – 3:00

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.

Bank Reconciliation Tips and Tricks

Thursday: 3:15 – 4:15

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.

Payroll, Accounts Payable, and Accounts Receivable Reporting

Friday: 3:15 – 4:15

Learn how to get the most out of reports and table lists within Payroll, Accounts Payable, and Accounts Receivable. 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.

Question and Answer

Friday: 8:30 – 9:30

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. 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.

General Ledger Reporting

Friday: 8:30 – 9:30

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.

Laserfiche Integration

Friday: 9:45 – 10:45

If your community is utilizing or thinking about utilizing Laserfiche for document management, this class will explore the synergies between our financial software and Laserfiche. We will cover how to integrate accounts payable workflow to Laserfiche, view documents from Laserfiche within Inquiry screens, and integrating Laserfiche web forms. OPG-3, a top Laserfiche reseller, will be on hand to co-present this topic.

(Financial sessions – continued)

Payroll – Federal and State Reporting

Friday: 9:45 – 10:45

Review reporting for both federal and state. We will discuss employee forms and how they related to the software (including I9 and W4's). In addition, we will review the quarterly 941 form, W-2's, 1099's, state unemployment filing, state retirement reports, and common surveys (employee count, EEOC, census, and vendor/salary payments).

Tips and Tricks

Friday: 9:45 – 10:45

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.

miExcel General Ledger and Utility Billing

Friday: 11:00 – 12:00

Review and explore the Excel add-in for General Ledger and Utility Billing. 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 utility customers along with importing meters, meter change outs, rate changes, and more.

Budgeting

Friday 11:00 – 12:00

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. In addition, we will review tools available in miViewPoint for departments to enter their budgets.

Utility Billing sessions

Balancing Utility Billing to the General Ledger

Thursday: 10:00 – 11:00

This session will provide an in-depth look at the relationship between General Ledger and Utility Management. We will review how General Ledger accounts are assigned in Utility Management and which take precedence between rates and services. Learn steps for balancing between Utility Management and General Ledger including the cash clearing account. Explore what entries are created in the General Ledger and which journal codes are used to create those entries.

Tips and Tricks

Thursday: 10:00 – 11:00

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.

(Utility Billing – continued)

Advanced Utility Billing I

Thursday: 11:15 – 12:30

Advanced Utility Billing topics will be discussed during this session. Customer inquiry, changing customer numbers, stop billing a service, delete old accounts, and transferring information to a new account at final billing will be covered. In addition, we will cover how to use some reports such as balancing the sales tax report, utilizing the consumption analysis report, location report (bill active users) and more. Attend this session to help you better manage the Utility Billing module.

What's New in Connect

Thursday: 11:15 – 12:30

Learn about the enhancements and changes in the new version called Connect. We will cover enhancements like the new report writer. In addition, we cover changes to customer inquiry, service order inquiry, payment adjustments, collection codes, and more.

Advanced Utility Billing II

Thursday: 1:45 – 3:00

Advanced Utility Billing topics will be discussed during this session. Creating a customer for a new location, manual payment allocation, entering NSF checks, how to enter date ranges, adjustments (billing, payment, and write-off), and how to create equal pay amounts will be covered. Attend this session to help you better manage the Utility Billing module.

Question and Answer

Thursday: 1:45 – 3:00

This session provides users a guided forum to share ideas and ask questions about Utility Billing. This session relies heavily on attendee questions and interaction. 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.

Service Orders

Thursday: 3:15 – 4:15

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.

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.

(Utility Billing – continued)

Cash Receipting and Online Payments

Friday: 8:30 – 9:30

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

Friday: 9:45 – 10:45

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.

Meter Management

Friday: 11:00 – 12:00

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.

Creating/Editing Forms

Friday: 11:00 – 12:00

Learn 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.

Miscellaneous

Excel Tips and Tricks – Beginner

Thursday: 11:15 – 12:30

New to Excel? This session will concentrate on the basics of Excel. Learn about worksheets, functions that will assist you in your everyday, creating graphs, filtering, and more.

Excel Tips and Tricks – Advanced

Thursday: 3:15 – 4:15

Not new to Excel but you want to learn more about how to better utilize Excel? This session will concentrate on more advanced topics of Excel. Learn about parsing, flash fill, scenario manager, sparklines, data validation, macros, and more.

Laserfiche Demonstration – Optional (Lunch Provided)

Friday: 12:15 – 1:15

OPG-3, a top reseller of Laserfiche, will demonstrate the powerful capabilities of Laserfiche's document management system. They will show how to store and retrieve documents, route a document for approval, setting up web forms, and much more. If you are able to attend, lunch will be provided by OPG-3. Hope to see you there.

New User

We have added a number of sessions to help the new employee who has not received formal training. 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.

General Ledger – New User

Thursday: 10:00 – 11:00

Payroll – New User (*double session*)

Thursday: 11:15 – 12:30 and 1:45 – 3:00

Accounts Payable – New User

Thursday: 3:15 – 4:15

Clarity Accounts Receivable – New User

Friday: 8:30 – 9:30

Clarity Utility Billing – New User (*double session*)

Friday: 9:45 – 12:00

A large, light gray watermark of the Civic Systems logo is centered on the page. The logo consists of a circular emblem with vertical bars of varying heights inside, and the words "Civic" and "Systems" stacked below it in a large, sans-serif font.

Civic
Systems