
22nd Annual Symposium

Session Descriptions

Sessions have been broken down into five (5) different tracks – New User, Financial, Payroll, Utility Billing, and Miscellaneous. The following is a description of each session and the sessions being provided in all five (5) tracks.

Please note: All times are Central Standard Time (CST).

Financial Sessions

Basic miExcel and Excel

Thursday, September 15: 10:00am – 11:00am (In-Person and Virtual)

This session will cover beginner level basics of both Excel and miExcel. We will cover useful functions and tips and tricks on how to better utilize Excel. We will then cover how to employ this knowledge to our Excel add-in we call miExcel. We will dive into how we can start to make our spreadsheets more powerful and how to import information from our Excel spreadsheets back into Connect.

Journal Entries

Thursday, September 15: 11:15am – 12:30pm (In-Person and Virtual)

Learn the different way to enter journal entries. We will review entering a journal entry manually, importing, setting up journal entry templates, how to handle recurring journal entries, routing a journal entry for approval, attaching supporting documentation for the journal entry and more.

Bank Reconciliation

Thursday, September 15: 1:45pm – 3:00pm (In-Person and Virtual)

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.

Advanced miViewPoint

Thursday, September 15: 3:15pm – 4:15pm (In-Person and Virtual)

This session will cover the departmental portal called miViewPoint which provides the tools department heads need to better run their department. We will cover tips and tricks on how to customize the look and feel of miViewPoint. We will cover how to troubleshoot when things go wrong like finding where an invoice is at in workflow, resetting filters, correcting invoices, balancing approved invoices with Connect and much more.

Budgeting

Friday, September 16: 8:30am – 9:30am (In-Person and Virtual)

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 entering your budget into the General Ledger, import your budget from Excel, budget journals, and monitoring the budget. In addition, we will review tools available in miViewPoint for departments to enter their budgets.

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Financial Sessions (cont.)

Balancing Utility Billing to the General Ledger

Friday, September 16: 8:30am – 9:30am (In-Person and Virtual)

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 and best report options for balancing between Utility Management and General Ledger including the cash clearing account and accounts receivable. Explore what entries are created in the General Ledger and which journal codes are used to create those entries.

Reporting – Financial Modules

Friday, September 16: 9:45am – 10:45am (In-Person and Virtual)

Learn how to get the most out of reports, financial statements, and table lists within the financial 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.

Advanced miExcel and Excel

Thursday, September 15: 11:00am – 12:00pm (In-Person and Virtual)

This session will cover Excel and miExcel at a more advanced level. We will cover higher level tools to use in Excel such as the vlookup function, pivot tables and graphs, sparklines, and more. In addition, we will dive into more advanced capabilities of our Excel add-in we call miExcel. We will cover how to employ our some of our more uncommonly used custom functions to combine with useful imports such as allocating interest income. Join us for this session to find out how to “supercharge” your spreadsheets.

Payroll Sessions

miPay

Thursday, September 15: 10:00am – 11:00am (In-Person and Virtual)

This session will cover how you can provide access to payroll checks and W-2's to your employees online. In addition, we will cover the changes in miPayOnline over the past year including the ability to manage employee action requests such as changes of address, change of name, contact maintenance, and direct deposit maintenance. We will also cover the ability to request and approve time off within the site. Finally, we will cover the capabilities in the mobile application.

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Payroll Sessions (cont.)

miTime

Thursday, September 15: 11:15am – 12:30pm (In-Person and Virtual)

Learn how to have employees enter their time into miTime for supervisors to approve. We will review the setup of miTime including setting up tasks, time entry templates, standard entries and more. We will cover how the employee enters time along with how supervisors go about approving that time. In addition, we will preview the punch-in, punch-out capabilities. We will cover how to troubleshoot items like when time is not approved by an employee/supervisor, when time is approved too early, and when time needs to be changed/ added. Finally, we will review how employees and supervisors can utilize our mobile app.

Leave Time

Thursday, September 15: 1:45pm – 3:00pm (In-Person and Virtual)

Learn how Leave Time works within Payroll. We will cover how to setup accrual schedules to accommodate how and when leave is accrued for your employees. In addition, we will cover manual adjustments to leave and how to produce a leave payout check.

Reporting – Payroll Module

Thursday, September 15: 3:15pm – 4:15pm (In-Person and Virtual)

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 removing columns on a canned report, and utilizing the report writer to create reports from scratch.

miExcel Payroll

Friday, September 16: 8:30am – 9:30am (In-Person and Virtual)

Learn how to get the most out of our powerful miExcel add-in to enhance the functionality of Payroll. Learn how it can help you with enhanced reporting using our custom Excel functions. In addition, learn how to import timesheets, deductions changes, hourly rates, and more.

Pay Codes

Friday, September 16: 9:45am – 10:45am (In-Person and Virtual)

This session will review the basics of how to setup a pay code. We will cover the different settings and how these settings control how a pay code calculates. We will cover each tab including how the Used In Calculations and Used For Calculation tabs work.

Managing Employee Records

Friday, September 16: 11:00am – 12:00pm (In-Person and Virtual)

This session will review maintaining employee information such as pay codes, leave time, limits, positions, and more. In addition, we will cover how to add from scratch or copy from an existing employee, how to properly terminate an employee, how to update pay rates/schedules, an overview of date fields, and employee allocations. Finally, we will review attachments and user-defined fields.

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Utility Billing Sessions

Managing Customer Records

Thursday, September 15: 10:00am – 11:00am (In-Person and Virtual)

This session will review the changes to New Customer Setup and Modify Existing Customers. In addition, we will review how co-signers and master contacts work along with contracts and energy assistance.

Tax Certification

Thursday, September 15: 11:15am – 12:30pm (In-Person and Virtual)

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

Utility Billing Report Writer

Thursday, September 15: 1:45pm – 3:00pm (In-Person and Virtual)

This session will concentrate on the new Report Writer available in all modules. This report writer replaces the traditional Table Lists. The examples used in this session will concentrate specifically on Utility Billing. Learn how to utilize the wizard to quickly create and generate custom reports from scratch.

Meter Management

Thursday, September 15: 3:15pm – 4:15pm (In-Person and Virtual)

We will review the timing of meter change out entry, modify meters, setting up solar meters, multiple meters and other meter management activities. In addition, we will review action codes, reading codes and information for electronic reading, and importing meter change outs from Excel.

Balancing Utility Billing to the General Ledger

Friday, September 16: 8:30am – 9:30am (In-Person and Virtual)

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 and best report options for balancing between Utility Management and General Ledger including the cash clearing account and accounts receivable. Explore what entries are created in the General Ledger and which journal codes are used to create those entries.

Service Orders and Maintenance Orders

Friday, September 16: 9:45am – 10:45am (In-Person and Virtual)

The Service Orders module assists with better communication with the meter department and provides you with the ability to track what is being done at a service location or with a meter. We will also be reviewing our updated remote service order mobile application. In addition, we will cover Maintenance Orders and how public works can log and track those non-utility tasks that need to be completed like fixing a pothole or cutting fallen tree. Join us for an overview on how this module can help your office be more efficient and effective.

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Utility Billing Sessions (cont.)

Reporting – Utility Billing Module

Friday, September 16: 11:00am – 12:00pm (In-Person and Virtual)

Learn how to get the most out of the canned reports in Utility Billing. This session will explore using the powerful reporting tools that are available, such as exporting reports to Excel, adding or removing columns, filtering your report using selection criteria, and changing the report order of your report. We will also review the Utility Billing reporting capabilities of miExcel.

Miscellaneous Sessions

System Management

Thursday, September 15: 10:00am – 11:00am (In-Person and Virtual)

This session will concentrate on how to manage the overall software. We will discuss groups, user security, system backups, history and management tracking, how to manage your steps checklist, and much more. Finally, we will cover how to integrate Active Directory with your user setup and master records.

Moving to the Cloud

Thursday, September 15: 11:15am – 12:30pm (In-Person and Virtual)

Join Ontech as they talk about taking your data and applications to the cloud. Civic has partnered with Ontech to provide a cloud solution. This solution allows you to minimize hardware and IT costs and gives you the assurance that someone is maintaining and backing up your system. Listen to how you can do away with your physical servers.

General Tips and Tricks

Thursday, September 15: 1:45pm – 3:00pm (In-Person and Virtual)

Join us if you need a refresher or want to learn fun tips and tricks related to the Connect software. We will walk through customizing your environment including modifying the steps checklist, setting up favorites, using split screens, and using zoom. We will cover modifying search screens, print from inquiry, deleting history, creating user-defined fields and much more.

Managing in a Rising Interest Environment – Tips for Local Government

Thursday, September 15: 3:15pm – 4:15pm (In-Person and Virtual)

Join Baker Tilly Municipal Advisors as they discuss how rising interest rates are making financial and operational environments more challenging for municipalities across the country. This session will explore a proactive strategy for managing municipal finances in a rising interest rate environment. A well thought out strategy, composed mindset, level-headed decision-making and collaboration with our municipal advisor will help local governments thrive through this challenging time.

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Miscellaneous Sessions (cont.)

Building Permits and Code Enforcement

Friday, September 16: 8:30am – 9:30am (In-Person and Virtual)

Learn how to easily process building permits, manage inspections, import and update property information from electronic files, and record and tack information based on each permit type. In addition, learn how Code Enforcement can create inspection schedules and checklists, easily escalate tracked complaints to violations, charge fees, issue notices and schedule inspections for violations.

Community Portal

Friday, September 16: 9:45am – 10:45pm (In-Person and Virtual)

Learn about the Community Portal and how citizens can apply for and manage their building permits. We will show how you can control which permits can be applied for online along with what questions need to be asked on a permit-by-permit basis. Finally, we will discuss future integrations to the portal with modules such as Utility Billing and Business License

Business Licenses and Animal Licenses

Friday, September 16: 11:00am – 12:00pm (In-Person and Virtual)

This session will cover a high level overview of the operational capabilities of both animal licensing and business licensing. We cover setting up a customer/business, adding a license, renewing and printing the license. We will also touch on how businesses can renew their business licenses through the Community Portal.

New User Sessions

We are providing 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

Monday, September 12: 8:30am – 10:00am (Virtual)

Accounts Payable – New User

Monday, September 12: 10:30am – 12:00pm (Virtual)

Payroll – New User (double session)

Monday, September 12: 12:30pm – 4:00pm (Virtual)

Utility Billing – New User (double session)

Tuesday, September 13: 8:30am – 12:00pm (Virtual)

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New User Sessions (cont.)

Accounts Receivable – New User

Tuesday, September 13: 12:30pm – 2:00pm (Virtual)