
23rd 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).

New User Sessions (Virtual)

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 11: 8:30am – 10:00am (Virtual)

Accounts Payable – New User

Monday, September 11: 10:30am – 12:00pm (Virtual)

Payroll – New User (double session)

Monday, September 11: 12:30pm – 4:00pm (Virtual)

Utility Billing – New User (double session)

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

Accounts Receivable – New User

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

Financial Sessions (In-Person)

Advanced miViewPoint

Thursday, September 14: 10:00am – 11:00am

This session will cover some of the new features of miViewPoint including invoice parsing in Accounts Payable workflow, new Account Receivable invoice entry and customer inquiry, Cash Receipting entry, and Utility Billing inquiry screen. In addition, we will cover the new reporting capabilities along with reviewing some lesser-known capabilities within miViewPoint.

23rd Annual Symposium

Session Descriptions

Financial Sessions (In-Person) (cont.)

miExcel

Thursday, September 14: 11:15am – 12:30am

Learn how to get the most out of our powerful miExcel add-in to enhance the functionality of General Ledger and Accounts Payable. Learn how it can help you with financial reporting and budgeting by using our custom Excel functions. In addition, we will review importing journal entries, budgets, and invoices.

General Ledger Month End

Thursday, September 14: 1:45pm – 3:00pm

This session will cover the month end checklist in General Ledger. We will review which journal codes are to be used for those monthly journal entries and journal templates. In addition, we will review balancing your bank accounts, accounts payable accounts, utility billing receivable accounts, payroll liabilities, and more. Finally, we will review common reports used for month end along with closing the period.

Troubleshooting miViewPoint

Thursday, September 14: 3:15pm – 4:15pm

This session will cover how to troubleshoot common questions with miViewPoint. Learn how to reroute an invoice that is in the wrong workflow, how to see only new or pending invoices in queues and route an invoice to more than one department. In addition, we will show how to use the column chooser to see more fields in your data grids and how to handle a rejected invoice or budget. We will be asking for attendees to submit questions/topics they would like covered when registering for this class. The most popular questions/topics will be covered.

Reporting – Financial Modules

Friday, September 15: 8:30am – 9:30am

Learn how to get the most out of canned reports and the report writer within the financial modules. This session will explore filters and selection criteria, exporting to .csv or .pdf files, how to fix dates on batch reports, review common reports and how to edit their layouts, and much more.

Journal Entries

Friday, September 15: 9:45am – 10:45am

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. In addition, we will review journal codes and when you should use them.

Prepping for Your Audit

Friday, September 15: 11:00pm – 12:00pm

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 and how to export them, internal controls, what an auditor expects when doing your audit, user rights, what accounts should be reconciled, and more.

23rd Annual Symposium

Session Descriptions

Payroll Sessions (In-Person)

Managing Employee Records

Thursday, September 14: 10:00am – 11:00am

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.

miPay and Open Enrollment

Thursday, September 14: 11:15am – 12:30pm

This session will cover how you can provide access to payroll checks and W-2's to your employees online or through the miPay mobile app. We will cover common questions such as reusing an email address, resending welcome email, not able to see my W-2, how to use announcements and how to require acknowledgement, and much more. Finally, we will cover the new capabilities of open enrollment for benefits through miPay.

miTime

Thursday, September 14: 1:45pm – 3:00pm

Learn how to have employees enter their time into miTime for supervisors to approve. We will review common questions such as how to handle holidays that impact cut-off times, making corrections once a timesheet is approved, how to record time without paying it, approve time when employee/supervisor doesn't, downloading time more than once, and much more.

Pay Codes

Thursday, September 14: 3:15pm – 4:15pm

This session will review the basic setup of 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. In addition, we will cover incorporating leave rates and how to add pay codes to an employee and customizing at the employee level.

Payroll Reporting and Electronic Filing

Friday, September 15: 8:30am – 9:30am

Learn how to get the most out of canned reports and the report writer 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. In addition, we will cover the federal and state electronic filing for taxes, retirement, and SUTA.

Leave Time

Friday, September 15: 9:45am – 10:45am

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, leave payouts, and how we link leave to tasks in miPay.

23rd Annual Symposium

Session Descriptions

Payroll Sessions (In-Person) (cont.)

Payroll General Troubleshooting

Friday, September 15: 11:00am – 12:00pm

This session will cover common questions regarding processing payroll. Learn how to use multiple pay rates, handle payrolls crossing multiple fiscal years, handling an employee that doesn't start on the first step in a leave schedule, calculating checks more than once, forgot to pay an employee, how to handle checkout errors, and much more.

Utility Billing Sessions (In-Person)

Managing Customer Records

Thursday, September 14: 10:00am – 11:00am

This session will review reallocating credit service balances, adjustments including NSF's, collecting deposits, and refunding deposits through Check on Demand. Learn how to stop a billing service, change a customer number, fix checkout errors, and setup equal pay/budget customers.

Utility Billing Reporting and Report Writer

Thursday, September 14: 11:15am – 12:30pm

Learn how to get the most out of the canned reports and report writer 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. Also, learn how to utilize the report writer wizard to quickly create and generate custom reports from scratch.

Meter Management

Thursday, September 14: 1:45pm – 3:00pm

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

Thursday, September 14: 3:15pm – 4:15pm

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.

22nd Annual Symposium

Session Descriptions

Utility Billing Sessions (In-Person) (cont.)

Managing Delinquents and Collections

Friday, September 15: 8:30am – 9:30am

This class reviews how to effectively use the delinquent and shutoff processes. We will review reports, co-signers (landlords) notifications, collections comments, credit history, reconnect fees and much more.

Tax Certification

Friday, September 15: 9:45am – 10:45am

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.

Service Orders and Maintenance Orders

Friday, September 15: 11:00am – 12:00pm

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.

Miscellaneous Sessions (In-Person)

Community Portal

Thursday, September 14: 10:00am – 11:00am

Learn about the Community Portal and how citizens can pay for their utility bills, accounts receivable invoices, business licenses along with 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.

Laserfiche

Thursday, September 14: 11:15am – 12:30pm

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.

22nd Annual Symposium

Session Descriptions

Miscellaneous Sessions (In-Person) (cont.)

Moving to the Cloud

Thursday, September 14: 1:45pm – 3:00pm

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.

Building Permits and Code Enforcement

Thursday, September 14: 3:15pm – 4:15pm

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.

Tips and Tricks – All Modules

Friday, September 15: 8:30am – 9:30am

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.

Cash Receipting

Friday, September 15: 9:45am – 10:45am

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 types, 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. Finally, we will cover the new cash receipting capabilities within miViewPoint.

Community Portal (repeat)

Friday, September 15: 11:00am – 12:00pm

Learn about the Community Portal and how citizens can pay for their utility bills, accounts receivable invoices, business licenses along with 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.