civicsystems
strong software, strong community

24th 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 9: 8:30am – 10:00am (Virtual)

Accounts Payable – New User
Monday, September 9: 10:30am – 12:00pm (Virtual)

Payroll – New User *(double session)*
Monday, September 9: 12:30pm – 4:00pm (Virtual)

Utility Billing – New User *(double session)*
Tuesday, September 10: 8:30am – 12:00pm (Virtual)

Accounts Receivable – New User
Tuesday, September 10: 12:30pm – 2:00pm (Virtual)

IN-PERSON SESSIONS next page.

.

24th Annual Symposium

Session Descriptions

Financial Sessions (In-Person)

Bank Reconciliation

Thursday, September 12: 10:00am – 11:00am

This session is designed to assist with the details of the monthly bank reconciliation process including the new bank reconciliation features. 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.

New miViewPoint Features

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

This session will introduce you to the new features of miViewPoint (Cash Receipting, Accounts Receivable, Folder Document Viewer and Auto Import). We will review the process for each and an overview of the setup.

miExcel/Civic Connect

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

Learn how to get the most out of our powerful miExcel/Civic Connect 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, learn how to import journal entries, budgets, invoices, and manual checks.

Prepping for Your Audit I

Thursday, September 12: 1:45pm – 3:00pm

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 how and more.

Prepping for Your Audit II

Thursday, September 12: 3:15pm – 4:15pm

This session will continue preparing for your audit and 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 how and more.

Journal Entries

Thursday, September 12: 3:15pm – 4:15pm

Learn the different ways 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.

.

24th Annual Symposium

Session Descriptions

Financial Sessions (In-Person) (cont.)

Troubleshooting miViewPoint

Friday, September 13: 8:30am – 9:30am

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/dashboard 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. Finally, we will cover how to add new accounts to budgets that are in process.

miExcel/Civic Connect **REPEAT SESSION**

Friday, September 13: 9:45am – 10:45am

Learn how to get the most out of our powerful miExcel/Civic Connect 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, learn how to import journal entries, budgets, invoices, and manual checks.

Budgeting

Friday, September 13: 11:00pm – 12:00pm

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.

Payroll Sessions (In-Person)

Managing Employee Records

Thursday, September 12: 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.

Pay Codes and Calculations

Thursday, September 12: 10:00am – 11:00am

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 and allocates to the general ledger. 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, how to add pay codes to an employee, and how to customize these pay codes at the employee level. We will touch on custom calculations for pay codes like garnishments, longevity etc.

.

24th Annual Symposium

Session Descriptions

Payroll Sessions (In-Person) (cont.)

Troubleshooting miPay and Open Enrollment

Thursday, September 12: 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.

Payroll Reporting

Thursday, September 12: 1:45pm – 3:00pm

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.

miExcel Payroll

Thursday, September 12: 3:15pm – 4:15pm

Learn how to get the most out of our powerful miExcel/Civic Connect 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.

Payroll General Troubleshooting

Friday, September 13: 8:30am – 9:30am

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.

Pay Codes and Calculations **REPEAT SESSION**

Friday, September 13: 9:45am – 10:45am

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 and allocates to the general ledger. 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. We will touch on custom calculations for pay codes like garnishments, longevity etc.

.

.
24th Annual Symposium
Session Descriptions

Payroll Sessions (In-Person) (cont.)

Managing Employee Records **REPEAT SESSION**

Friday, September 13: 9:45am – 10:45am

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.

Troubleshooting miTime

Friday, September 13: 11:00am – 12:00pm

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.

Utility Billing Sessions (In-Person)

Meter Management

Thursday, September 12: 10:00am – 11:00am

We will review the timing of meter change out entry, modify meters, setting up 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 miExcel.

Managing Customer Records I

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

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

Managing Customer Records II

Thursday, September 12: 1:45pm – 3:00pm

This session is a continuation of Customer Records I. In addition, we will cover the new delinquent notice process, energy assistance and deleting inactive customers.

.

24th Annual Symposium

Session Descriptions

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

Service Orders

Thursday, September 12: 3:15pm – 4:15pm

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.

NSF Checks/Payment Adjustment Options

Friday, September 13: 8:30am – 9:30am

Learn the three different ways to process NSF checks and the implications for the General Ledger. Review all the Payment Adjustment options and what the general ledger entries need to be done to keep the Utility Cash Clearing account balanced.

Tax Certification

Friday, September 13: 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.

Utility Billing Reporting and Report Writer

Friday, September 13: 11:00am – 12:00pm

Learn how to get the most out of 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.

.

24th Annual Symposium

Session Descriptions

Miscellaneous Sessions (In-Person)

Cash Receipting

Thursday, September 12: 10:00am – 11:00am

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.

System Management

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

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.

Reporting (all modules)

Thursday, September 12: 1:45pm – 3:00pm

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

Building Permits/Citizen Portal

Thursday, September 12: 1:45pm – 3:00pm

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. In addition, learn how the Citizen Portal can be used to allow citizens to apply for and manage their permits, pay for permits and how you can create custom forms for use in the portal.

Citizen Portal Generic Module

Thursday, September 12: 3:15pm – 4:15pm

Learn about the Community Portal General Module and how you can use this to allow citizens to pay for items (outside of Utility Management, Accounts Receivable and Business License) like vehicle stickers, garbage stickers, etc. We will walk through how you can control which items can be processed, how to setup forms and accept payments.

Tips and Tricks – All Modules

Friday, September 13: 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.

.

24th Annual Symposium

Session Descriptions

Miscellaneous Sessions (In-Person) (cont.)

Report Writer (all Modules)

Friday, September 13: 8:30am – 9:30am

This session will walk through how to utilize the report writer wizard to quickly create and generate custom reports from scratch. We will review the table order (assisted by the wizard), selection criteria, report order, report sections and columns.

Citizen Portal

Friday, September 13: 9:45am – 10:45am

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

Excel

Friday, September 13: 11:00am – 12:00pm

This session will focus on the functionality of Microsoft Excel. We will walk through the most common menu items, shortcuts and functions. This session will work best if you can follow along on a laptop.

.