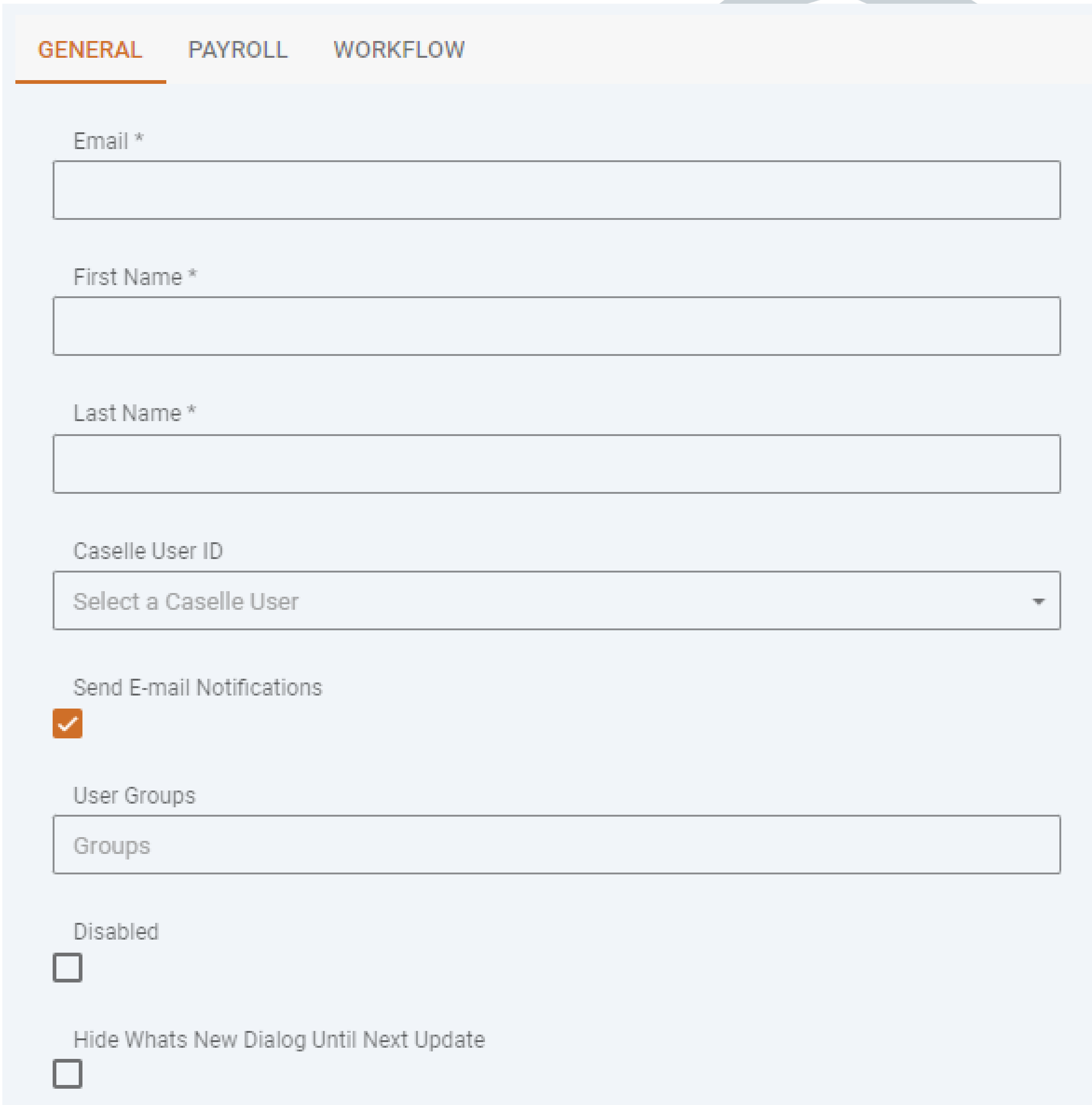
User Set Up

1. Create User



   a. General
      i. Enter email address
      ii. Enter first name
      iii. Enter last name
      iv. Connect to Caselle User ID – link to user in Connect. This will be required for users that are entering cash receipts

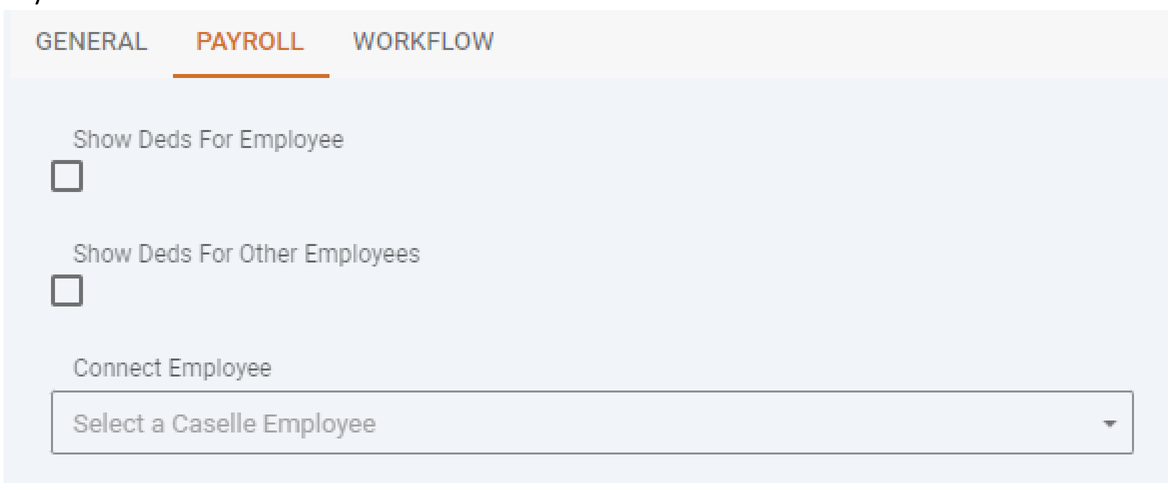
v. Send Email Notifications – this should be checked so users receive scheduled emails alerting them of approvals needed in workflows

vi. User Groups – If the groups exist already, you can add the user to groups while setting up a user. If the groups do not exist, users can be added to the groups while setting up the groups. To add a group to a user here, click in the groups box and check to the left of the group(s) you want to add the user to.

vii. Disabled – check this box if the user should not be able to log into miViewpoint

viii. Hide Whats New Dialog Until Next Update – If this box is not checked, the user will receive a popup every time he/she logs in of the changes in each release. If this box is checked, the user will only receive this popup when there has been an update to the site.

b. Payroll

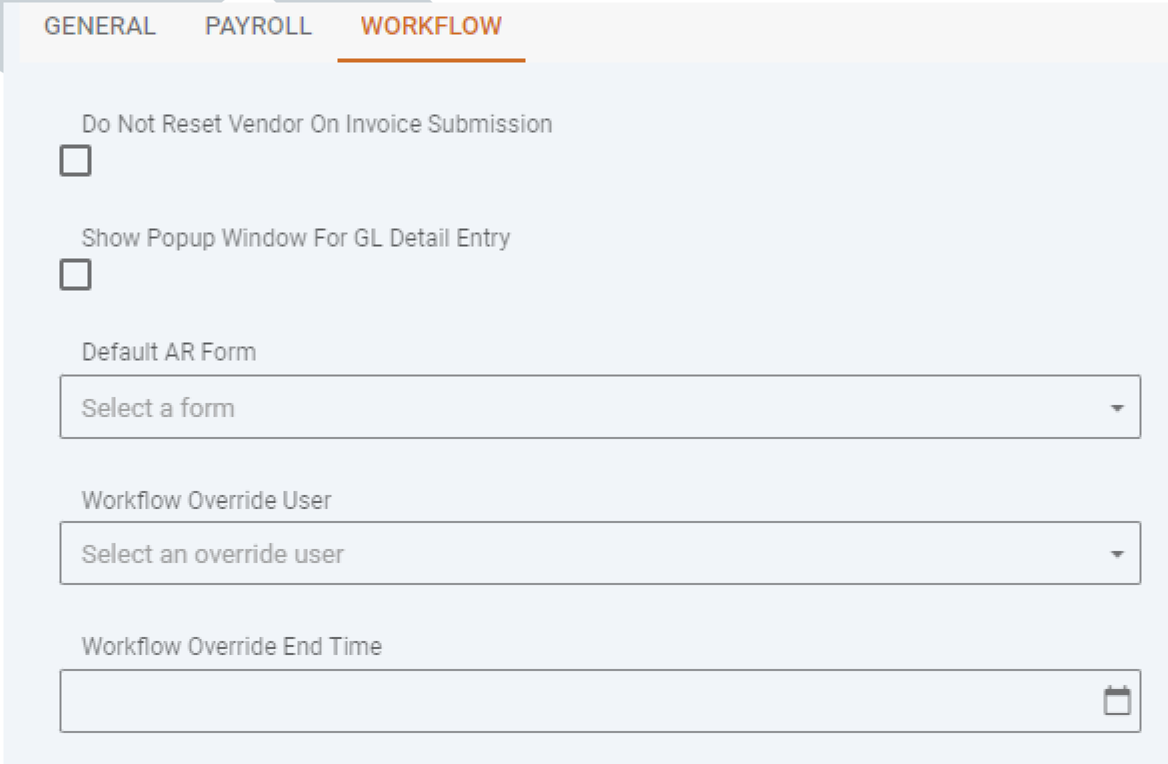


i. Show Deds for Employee – Check this box if you want an employee to see his/her own payroll deductions (we normally do not check this and have the employee view this information in mipayonline where the entire pay check is visible)

ii. Show Deds for Other Employees – Check this box if you want an employee to see the payroll deductions for all employees within his/her department. We do not normally check this option.

iii. Connect Employee – If you select the “Show Deds for Employee” option you need to select the employee from the payroll database listing that represents the user you are setting up. Click in the Connect Employee drop down to select the employee.

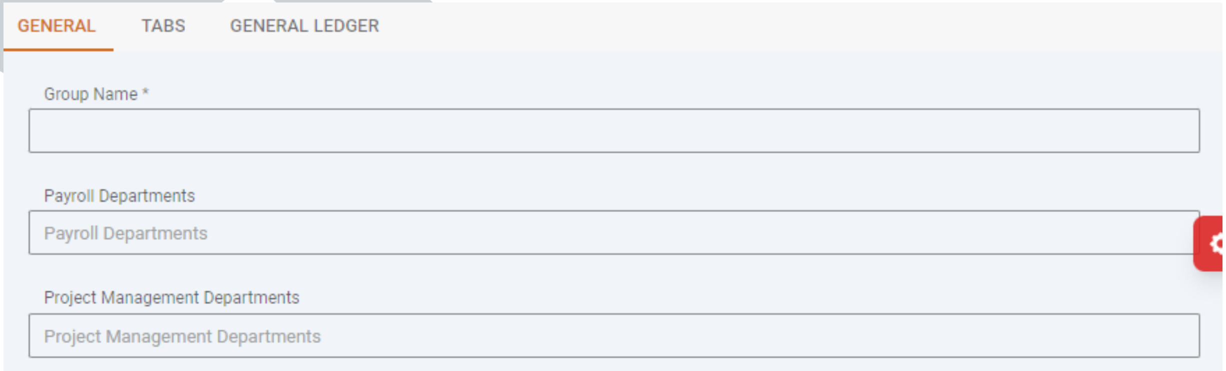
c. Workflow



i. Do Not Reset Vendor On Invoice Submission – If this box is checked, the vendor name will stay populated when the user finishes entering an AP invoice and starts to enter another. If the box is not checked the vendor name field will clear after each submission.
ii. Show Popup Window for GL Detail Entry – If this box is checked the user will receive a popup to enter each field of the invoice detail instead of potentially having to scroll across the screen. The pop up is not customizable while the scrolling screen is.
iii. Default AR Form – This gives you (or the user in his/her profile) the ability to set a default Invoice form so the invoices entered will print with the correct header.
iv. Workflow Override User - This gives you (or the user in his/her profile) the ability to provide another user the ability to approve workflow items while an employee is out of the office. Click in the drop down for “select an override user” and you can select any existing user within miViewpoint.
v. Workflow Override End Time – This ends the ability for the Workflow Override User to approve in the absence of the original approver.

2. Groups

a. General



   i. Group Name – Name the group. This will often be the name of the department. You may also have groups for specific purposes, for example: a View Only group – this group can view information in miViewpoint but may not be able to enter invoices/receipts; a Entry group (this could be broken further into groups that can enter AP invoices, AR invoices or Cash Receipts) and an Approval group.
   ii. Payroll Departments – Click in this field to select the department in the payroll database that the group should be able to see payroll information for (earnings, overtime, hours, benefits).
   iii. Project Management Departments – Click in this field to select the departments in the Project Accounting database that the group should be able to see the related costs for. ***** You will leave this blank as you are not using our project accounting database**

b. Tabs

   i. Administration – This is for the setup and administration of the miViewpoint site. We recommend you limit who has access to this menu.
      1. Invoice Workflow – checking this box will allow a user to be able to setup/modify the invoice workflows or approval processes for invoices
      2. PO Workflow - checking this box will allow a user to be able to setup/modify the purchase order workflows or approval processes for purchase orders
      3. Notification Settings – checking this box gives a user the ability to control whether and when emails are sent to users alerting them of the need to approve items in miViewpoint
      4. Api Users – This is used by the Civic Systems team only for setup.
      5. Email Events – This allows a user to see emails that are sent from the site and whether the emails are open/received/rejected etc.
      6. Laserfiche Meta Data Mapping – this is used to link with Laserfiche clients for electronic file storage
      7. Folder Viewer - This is used by the Civic Systems team only for setup.
      8. Organization – This allows the user to access the setup of the site, including wording on the home screen and connection to the databases.
      9. Groups – This allows the user the ability to setup/modify groups and group rights.

10. Users – This allows the user the ability to setup/modify users and user rights.
11. Journal Entry Workflow - checking this box will allow a user to be able to setup/modify the journal entry workflows or approval processes for journal entries
12. Budget Workflow - checking this box will allow a user to be able to setup/modify the budget workflows or approval processes for budgets
13. Form Designer – this allows the user the ability to create/edit to the online AP/AR forms (invoices, purchase orders etc)
14. Form Definitions – this allows the user the ability to see/delete all online forms
15. Payment Configuration – This allows a user to setup/edit the interface with a credit card service and certain cash receipt entry screen options.
16. Attachment Storage – This allows a user to add/remove folders where attachments are stored.

ii. General Ledger

1. Account Lookup – allows a user the ability to see approved account numbers – budget and actual and to drill into the detail of the account balance
2. Journal Lookup – allows a user the ability to see journals and review entries by journal code
3. Journal Entry – allows users to enter/submit journal entries for approval
4. Journal Entry Queues – this allows an approver to see journal entries that are awaiting their approval. This should be given to any user who enters or approves journal entries in the miViewpoint site.
5. Journal Entry Dashboard – this gives the user the ability to delete journal entries from the workflow. This should only be given to the Finance department staff
6. Journal Entry Status – This gives the user the ability to see entries the user has submitted or approved and where the entry is in the approval process
7. Budget Queues - this allows an approver to see budget entries that are awaiting their approval. This should be given to any user who enters or approves budget entries in the miViewpoint site.
8. Budget Dashboard – this gives the user the ability to delete budget entries from the workflow. This should only be given to the Finance department staff
9. Budget Status - This gives the user the ability to see entries the user has submitted or approved and where the budget entry is in the approval process
10. Activity Lookup – This allows users to see any transaction tied to approved activities. **You will be using activities for items like grants and contracts; so this should be provided to most users**

11. GL Reports – This allows users to run pre-defined reports that are limited to the account numbers they have been authorized to view

iii. Accounts Payable

1. Invoice Entry - allows users to enter/submit invoices for approval
2. Invoice Queues - this allows an approver to see invoices that are awaiting their approval. This should be given to any user who enters or approves AP invoices in the miViewpoint site.
3. Invoice Dashboard - this gives the user the ability to delete AP Invoices from the workflow. This should only be given to the Finance department staff
4. Invoice Status - This gives the user the ability to see AP Invoices the user has submitted or approved and where the Invoice is in the approval process
5. New Vendor Entry - allows users to enter/submit new vendor information for approval
6. New Vendor Queues – this allows an approver (Finance Staff) to see vendors that are awaiting their approval. This should only be given to the Finance department staff
7. New Vendor Dashboard - this gives the user the ability to delete vendors from the workflow. This should only be given to the Finance department staff
8. New Vendor Status - This gives the user the ability to see Vendors the user has submitted and where the Vendor is in the approval process
9. Check Import – This is used by the Finance/Treasury staff to upload the check images and tie to the invoices
10. Merge Vendors – This is used by the Finance staff if two existing vendor records are being combined
11. PO Request - allows users to enter/submit purchase orders for approval
12. PO Dashboard - this gives the user the ability to delete purchase orders from the workflow. This should only be given to the Finance department staff
13. PO Status - This gives the user the ability to see purchase orders the user has submitted and where the purchase order is in the approval process
14. PO Queues - this allows an approver to see purchase orders that are awaiting their approval. This should be given to any user who enters or approves purchase orders in the miViewpoint site.
15. PO Lookup – this gives the ability for a user to look up existing purchase orders and see invoices related to the purchase order
16. Vendor/Invoice Lookup – this gives the ability for a user to look up invoices by invoice number ,vendor or key words
17. Invoice Import – this gives the user the ability to upload and attach documents to previously paid invoices.
18. APReports – This gives the user the ability to run reports related to invoices/accounts that the user has access to view

iv. Payroll
   1. Employee list – this gives the employee the ability to see a list of employees tied to the payroll departments that were added to the group on the general tab. This screen will show the employees, their wages, hours and benefits
   2. Overtime Analysis – this will show the hours and dollars of overtime paid for selected timeframes and is limited to the payroll departments assigned to the group
   3. Leave Time – this will show the balances of leave time (vacation, sick, pto, comp etc) for employees in the assigned payroll departments
   4. Pay Period Analysis – this allows the user the see the payroll expenses (wages, overtime, benefits) by GL account

v. Other
   1. Folder Document Viewer – Allows users to upload and view reports from outside of the miViewpoint program
   2. Attachment Drop – Allows documents (invoices primarily) to be loaded and assigned to users by AP and the user will then see in the Invoice Entry screen.
   3. Attachment Grab – Allows documents to be loaded and seen by all users so the user can select the document (invoice) that belongs to him/her
   4. Parcel Lookup – allows user to view parcels and related permit/code violations etc

vi. Accounts Receivable
   1. AR Customer Lookup – allows users to view invoice and payment activity by customer
   2. AR Category Lookup – allows users to view invoices by category
   3. AR Invoice Entry - allows users to enter/submit invoices

vii. Project Accounting
   1. Project Inquiry – allows users to view activity related to projects

viii. Cash Receipting
   1. Cash Receipt Entry – allows users to enter/submit cash receipts
   2. Cash Receipt Inquiry – allows users to search/view previously entered receipts

c. Public Portal **(You may not see this tab if it is not licensed to your organization)**
   i. Accounts Receivable Portal Admin – used by Civic Systems and site admin to allow for online AR payments

d. Civic Connect Rights **(You may not see this tab if it is not licensed to your organization)** – This will control what rights the group has through Civic Connect (formerly known as miExcel)
   i. General Ledger
      1. Account Lookup – provides ability for user to pull a list of accounts and pull balances/budget amounts
      2. General Ledger Detail Drill Down – provides the ability for user to drill into account actual balance and see detailed transactions

3. Activity Lookup – provides user the ability to pull a list of activities and pull balances/budget amounts
4. Category Lookup – provides the user the ability pull a list of categories and pull balances
5. Journal Entry – provides ability for user to import journal entries into Connect
6. General Ledger Functions – provides user to build customized functions to pull data from Connect in the general ledger
7. Budget Entry – provides ability for user to import budget amounts into Connect

ii. Accounts Payable

1. Vendor Lookup – provides user ability to pull vendor information including dollar amounts paid to vendors
2. Bank Lookup – provides user ability to pull bank information including amounts and checks issued
3. Invoice Import – provides user ability to import invoices into Connect OR miViewpoint AP Workflow
4. Manual Check Import – provides user ability to import checks directly into Connect- Manual Check entry
5. Accounts Payable Functions - provides user to build customized functions to pull data from Connect in the accounts payable

iii. Payroll

1. Timekeeping Tasks Lookup – provides user ability to pull list of tasks and pull data from timekeeping by task
2. Timekeeping Activities Lookup – provides user ability to pull list of activities and pull data from timekeeping by activity
3. Pay Code Lookup – provides user ability to pull list of pay codes and pull data from payroll by pay code
4. Employee Lookup – provides user ability to pull a list of employees and pull data from payroll by employee
5. Time Import – allows user ability to import time into payroll
6. Timekeeping Import -allows user ability to import time into timekeeping
7. Time Table Import – allows user ability to import time into payroll (format/layout of data is different than Time Import)
8. Timekeeping Table Import – allows user ability to import time into timekeeping (format/layout of data is different than Timekeeping Import)
9. Update Pay Schedules – provides user ability to imported updated pay rates to existing pay schedules
10. Contributions Import – provides user ability to import updated deduction/benefits amounts to employee pay code settings in payroll
11. Hourly Rate Import – provides user ability to import updated hourly pay rates to employee position settings in payroll

12. Function Builder - provides user to build customized functions to pull data from Connect in the payroll
13. WI Retirement Functions – this is no longer needed

iv. Utility Management
1. Customer Lookup - provides user ability to pull customer information
2. Location Lookup - provides user ability to pull location information
3. Rate Lookup - provides user ability to pull information by rates
4. Services Lookup - provides user ability to pull information by services
5. Meters to Inventory Import – provides user ability to import new meters
6. Rates Import – provides user ability to update rates
7. Replace Meters Import – provides user ability to replace existing meters
8. Supplemental Import
9. Utility Management Functions - provides user to build customized functions to pull data from Connect in the Utility Management

3. General Ledger
   a. Balance Sheet Account Range – enter the account number(s) the group should be able to view and charge invoices to
   b. Revenue Account Range – enter the account number(s) the group should be able to view and charge invoices to
   c. Expenditure Account Range - – enter the account number(s) the group should be able to view and charge invoices to
   d. Activity Range - – enter the activity(ies) the group should be able to view and charge invoices to
4. Group Users - View and Edit users assigned to a group here