miViewpoint- Basic

Sympsosium- 2025

CASELLE®

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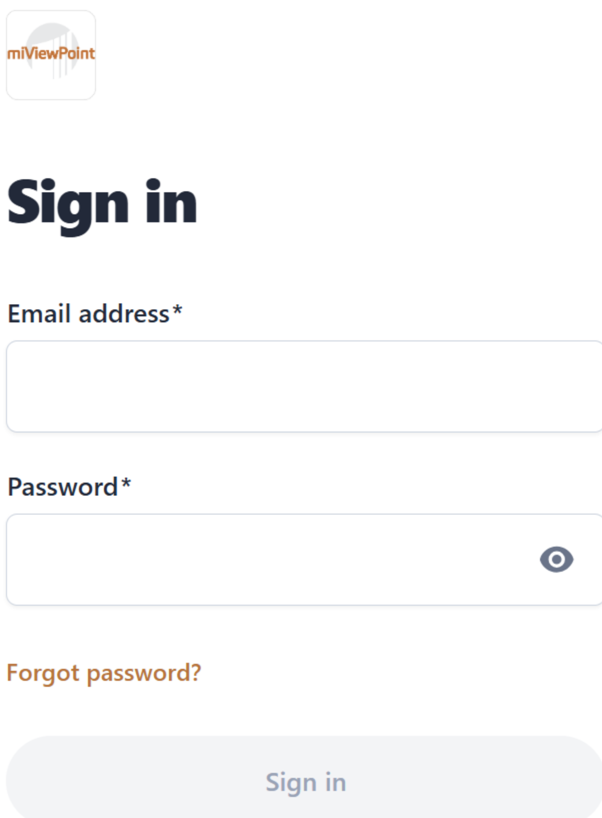
Log in

Logging On

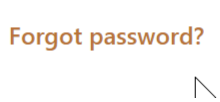
1. Go to the site address provided by the welcome email or by your site administrator.
2. Enter your email address in the Email field.
3. Enter your password in the Password field.
4. Click Log in.

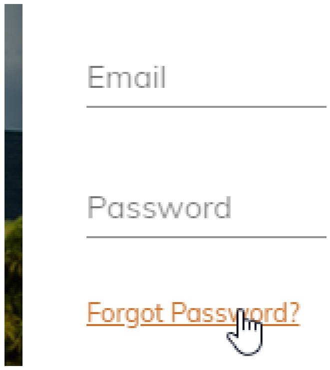


Resetting Your Password

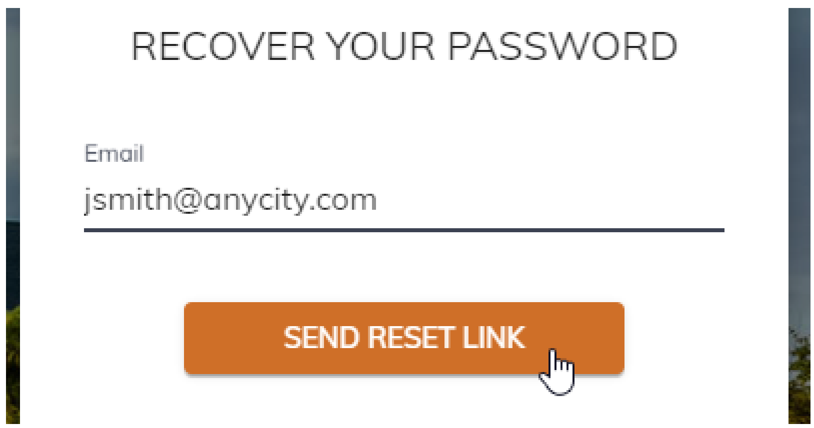
If you have forgotten your password or wish to change it, follow these steps to reset it:

1. Go to your miViewpoint site.
2. Click on Forgot Password? on the log in page.





3. Enter your email and click Send Reset Link.

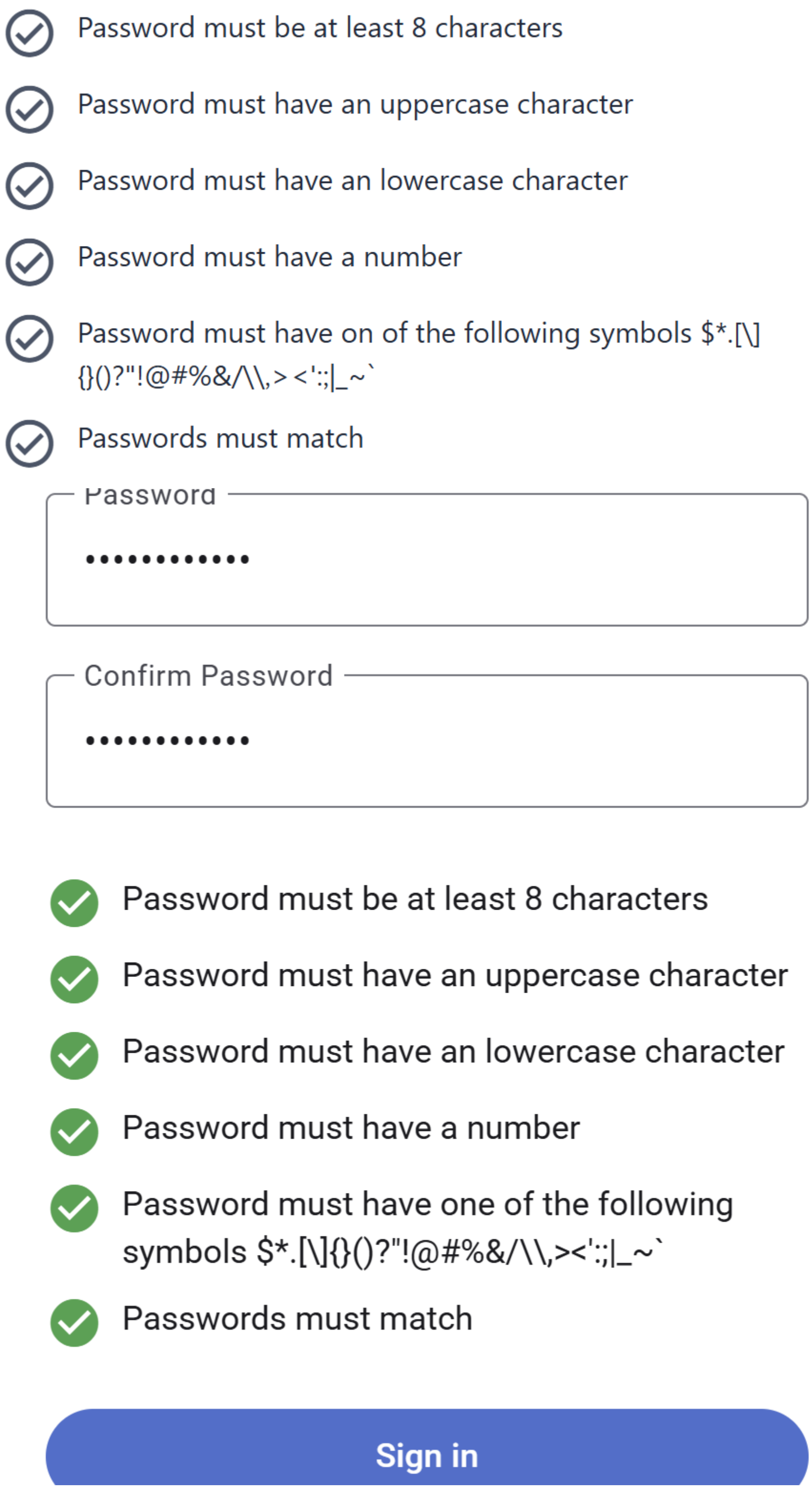


4. Click on the link in the Password Reset Email.

As requested you can click below to reset your portal account password

[Click here to reset your password]

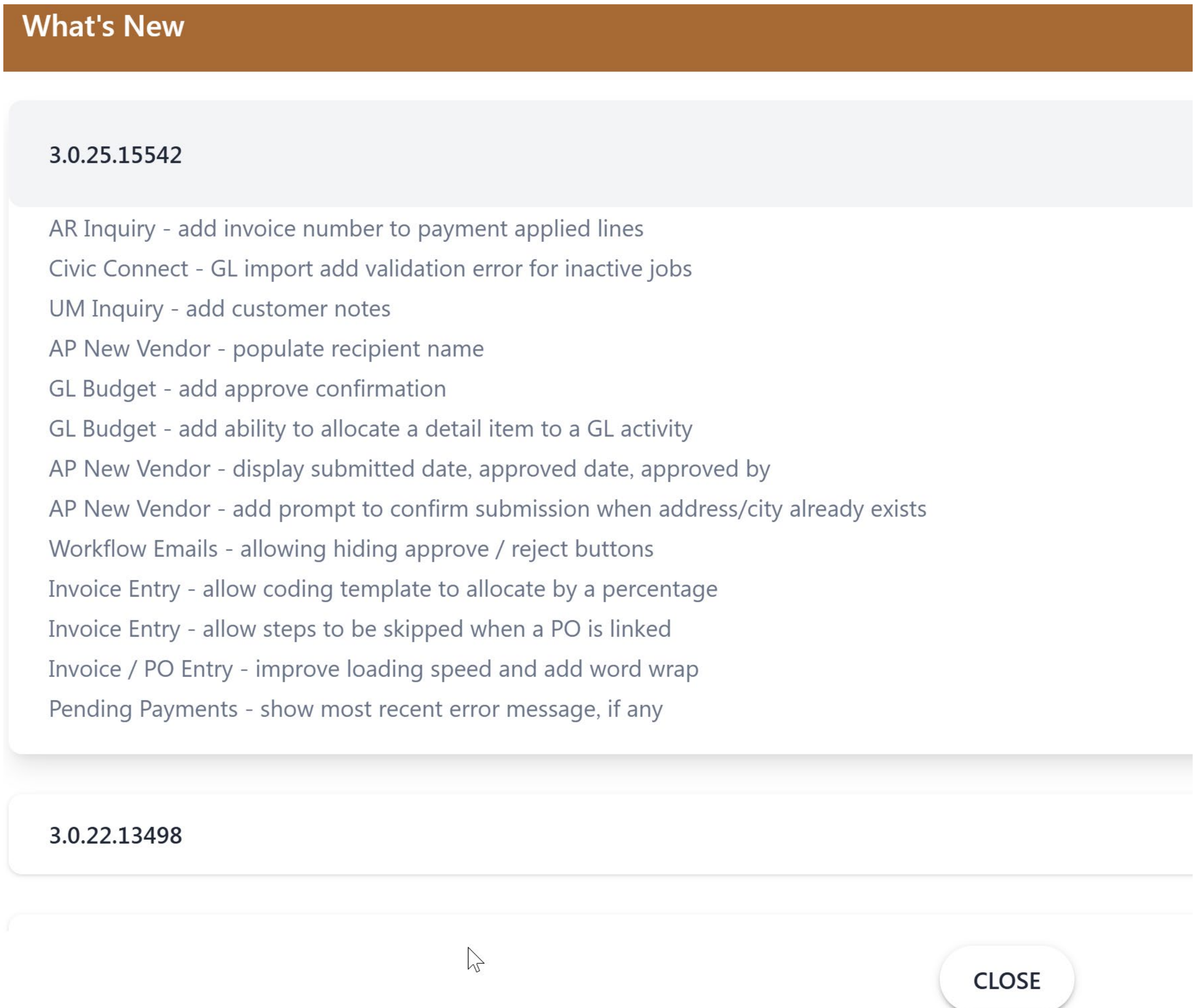
5. Enter a password in the Password field and confirm your password in the Confirm password field. Below are the password requirements.



6. Click the Sign In button to save.

What's New

You may receive a What's New pop-up message at login. This pop-up appears if there has been a new release installed since your last login. The What's New will list all the changes and enhancements on this latest release. Review the list and click Close when finished. This list can be accessed at any time by clicking the version number at the bottom of the menu on the left.



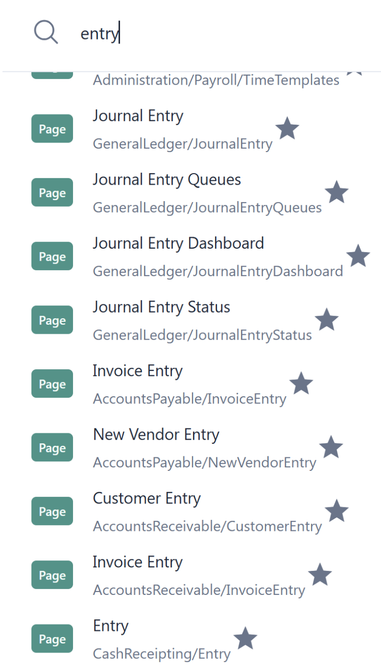
Display and Navigation Settings

Toggle Fullscreen-

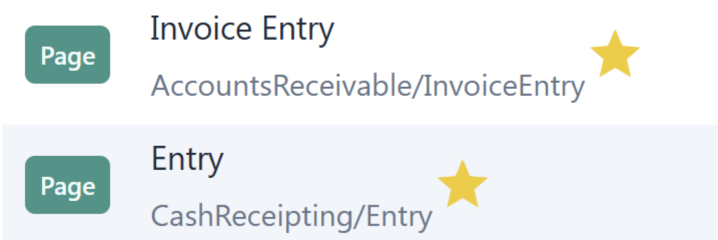
This icon allows your miViewpoint screen to expand to full screen. To enter/exit full screen mode, simply click the icon.

Adding Shortcuts-

To add items as a miViewpoint Shortcut, simply click the search icon and type in your desired shortcut. For example, let's say I most often use miViewpoint for entering invoices or entering cash receipts. I can search Entry and click the Star next to those items to add them to my favorites.

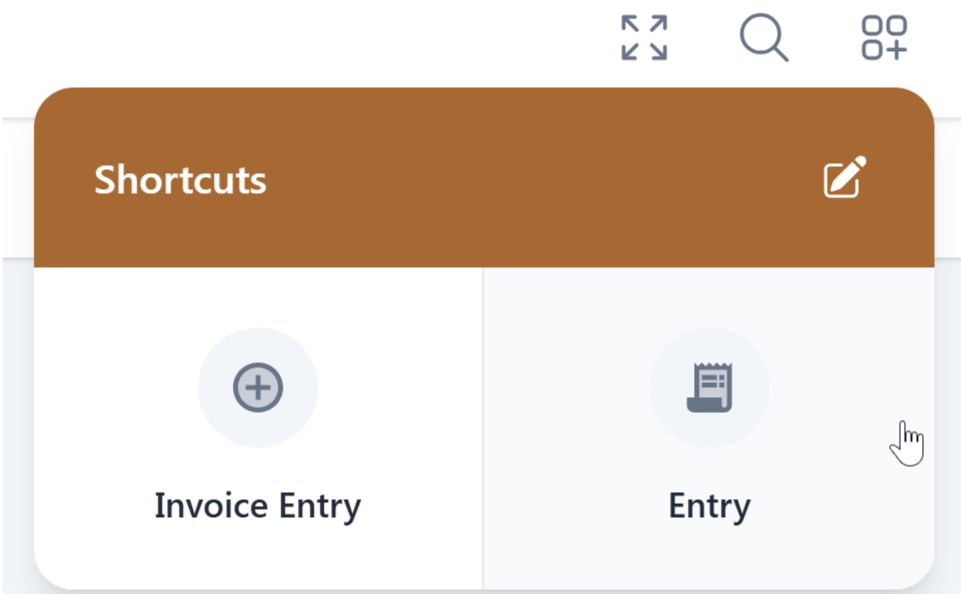


When you click the star, that star becomes yellow symbolizing that this has been added as a shortcut.



Accessing Shortcuts-

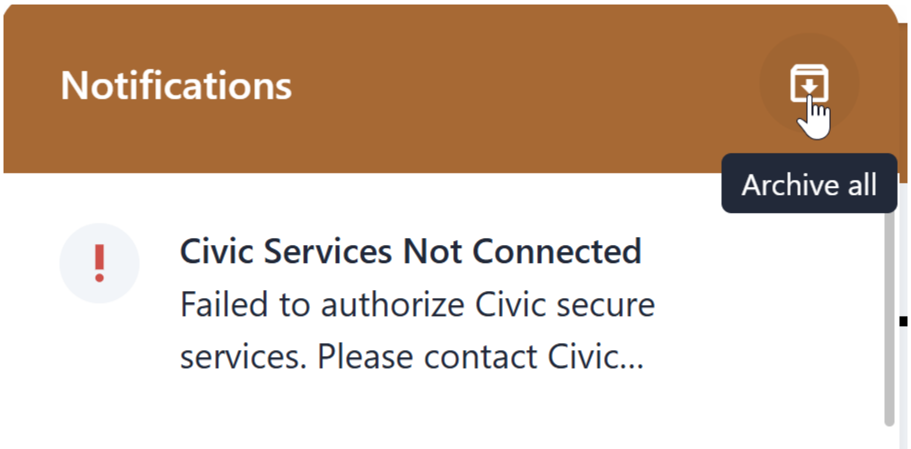
Click the above icon to access your saved shortcuts in miViewpoint.



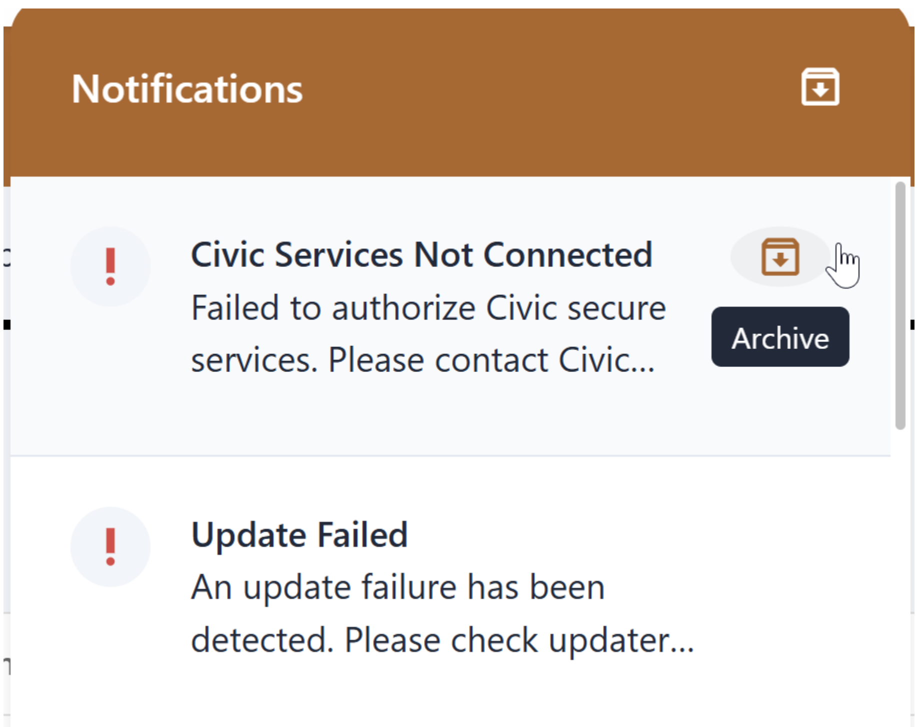
To access a shortcut, simply click on that selection from your Shortcuts and you will be taken to that screen in miViewpoint.

Notifications

The bell icon will display any notifications. After you have viewed any notifications, if you wish to clear them you can click Archive All to remove all existing notifications from your view.

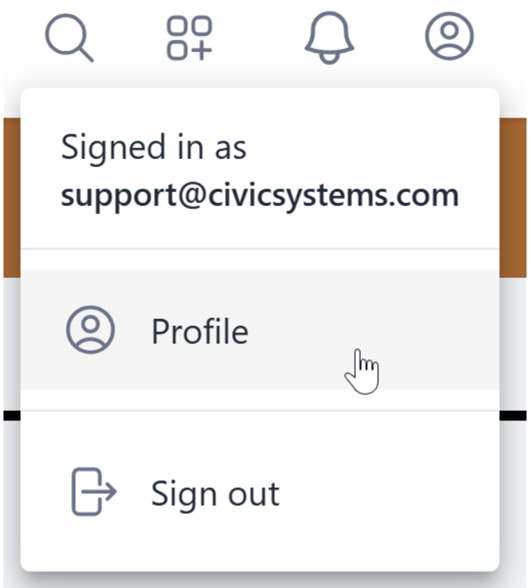


You can also choose to just archive one or more notifications by hovering over that notification and clicking Archive.



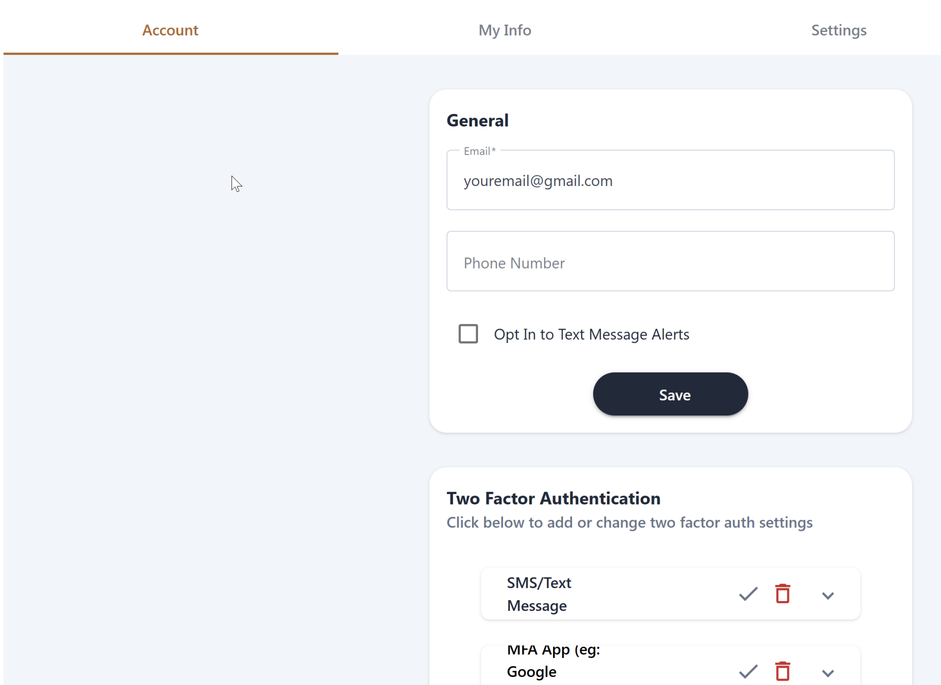
Profile

Click the above icon to log out of miViewpoint or to view your Profile.



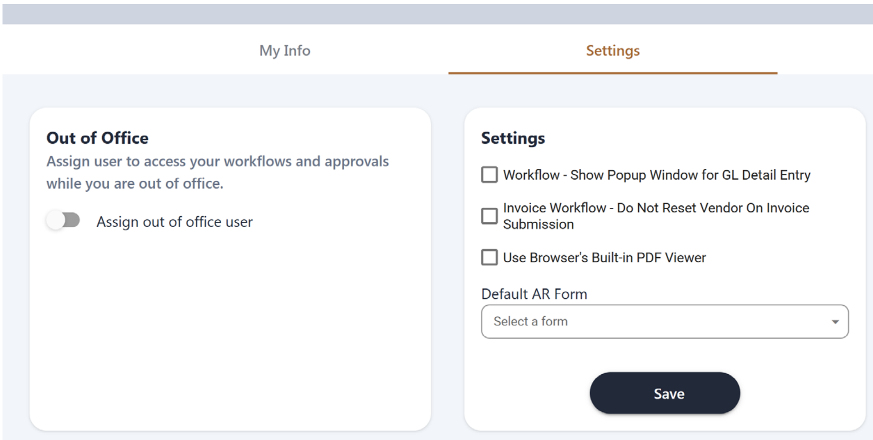
Profile- Account

Here you can see/modify your email address you use to log into miViewpoint. You can choose to add a phone number and to opt in to receive text message alerts. This is also where you can set up/modify two factor authentication.



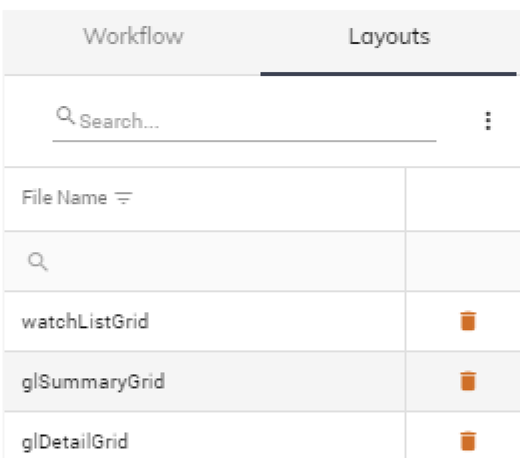
Profile- Settings

If you are going to be out of the office, you can assign an out of office user to take on your workflow/approval steps until you return. You can also change certain workflow settings on this screen. More details on workflows would be covered in a separate manual.



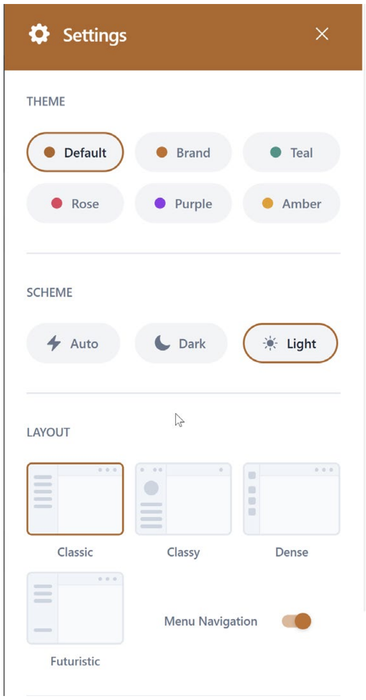
Profile- Layouts

This tab provides the ability to remove filtered settings within your profile. You can do this by clicking on the trash can across the grid name. This only removes filters from the screen, and deleting layout filters will not delete your data. This is a helpful took if you feel that you are not seeing all data on a screen you are viewing.



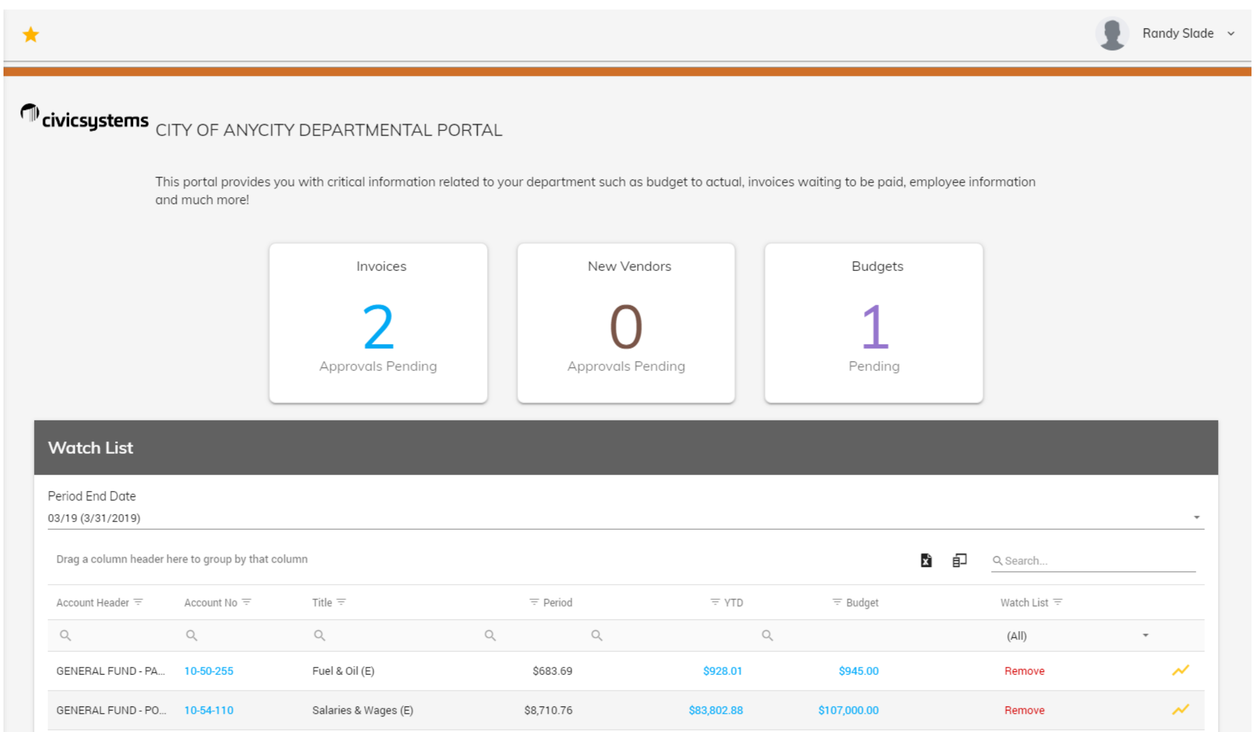
Settings

On the Settings screen, you can change your display settings such as color themes and page layouts.



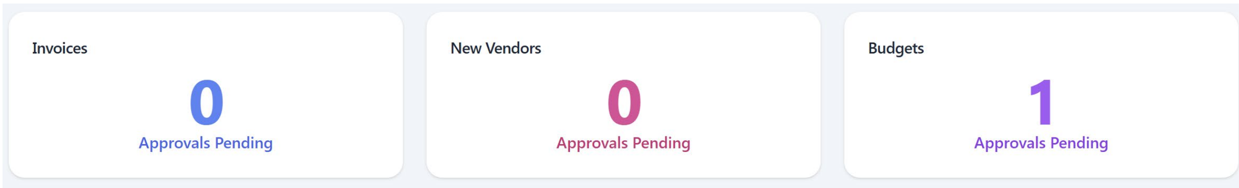
Home Screen

After logging in, you will land on the Home page. The Home page communicates items in your queue awaiting your approval and shows any accounts in your Watch List.



Approval Queues

The **Home** page will show any items needing your attention in tiles at the top. The tiles displayed depend upon what workflows have been implemented by your organization.

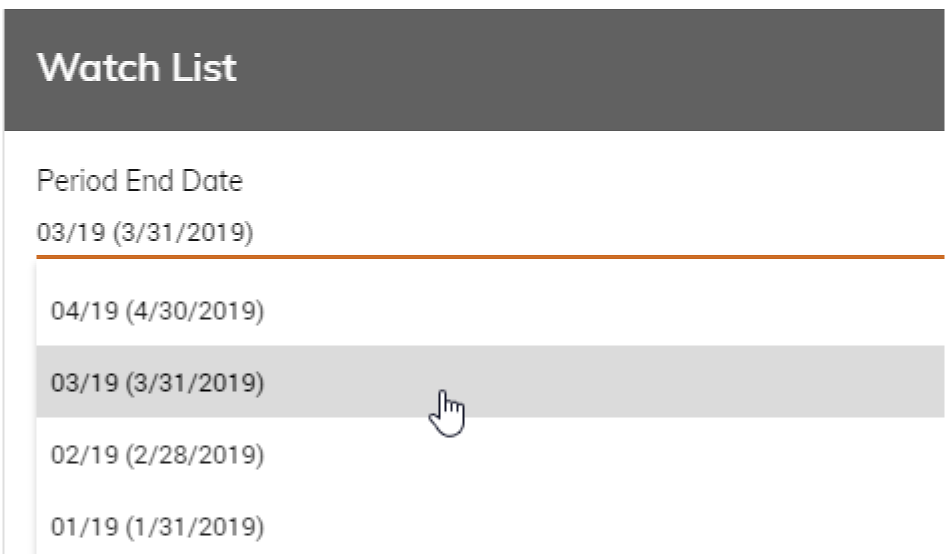


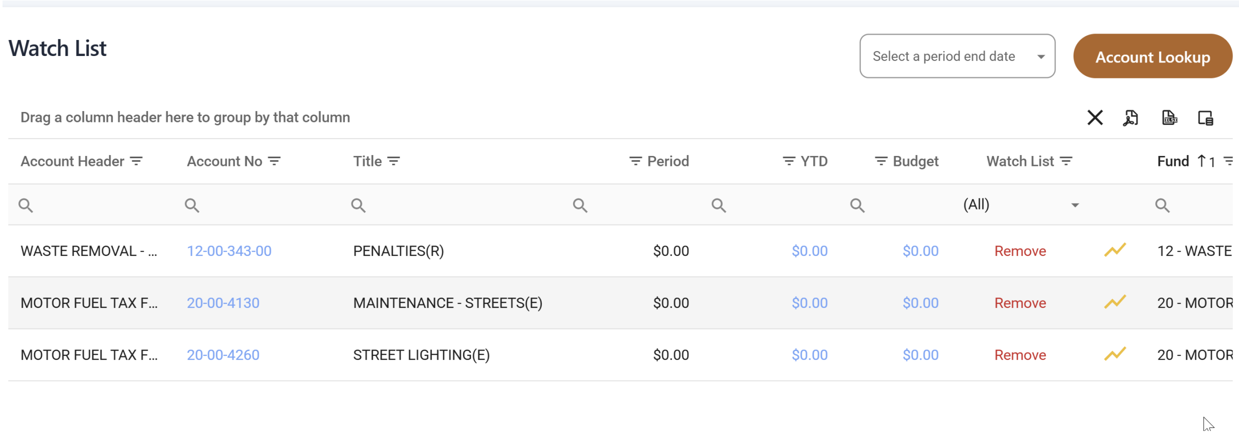
Watch List

The Watch List allows you to monitor the balances and activity of accounts you determine are a priority. The following lists the capabilities of the Watch List.

Period End Date

You can change the period end date to any date in the past or future by clicking on the Period End Date drop-down field. The columns in the Watch List will update automatically when the date is changed. The Watch List will always default to the current month unless a different month is selected from the Period End Date drop-down.





Watch List

Select a period end date

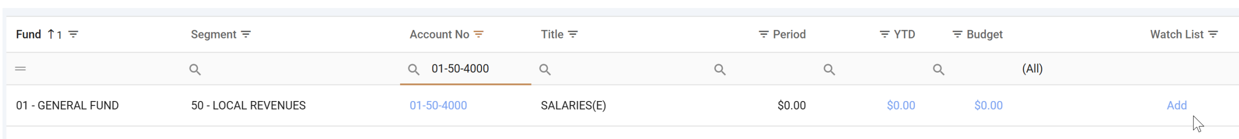
Account Lookup

Drag a column header here to group by that column

Account Header	Account No	Title	Period	YTD	Budget	Watch List		Fund ↑1
						(All)		
WASTE REMOVAL - ...	12-00-343-00	PENALTIES(R)	$0.00	$0.00	$0.00	Remove		12 - WASTE
MOTOR FUEL TAX F...	20-00-4130	MAINTENANCE - STREETS(E)	$0.00	$0.00	$0.00	Remove		20 - MOTOR
MOTOR FUEL TAX F...	20-00-4260	STREET LIGHTING(E)	$0.00	$0.00	$0.00	Remove		20 - MOTOR

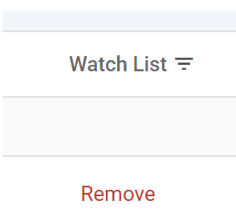
Adding an Account to Watch List

Navigate to General Ledger | Account Lookup. Search for an account you would like to add and click ‘ADD’ under the Watch List column.



Fund ↑1	Segment	Account No	Title	Period	YTD	Budget	Watch List
		01-50-4000				(All)	
01 - GENERAL FUND	50 - LOCAL REVENUES	01-50-4000	SALARIES(E)	$0.00	$0.00	$0.00	Add

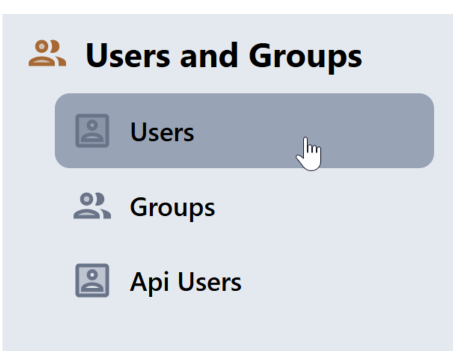
If an account if on your Watch List it will only have the Remove option under Watch List column. To remove an account from your Watch List, click Remove.



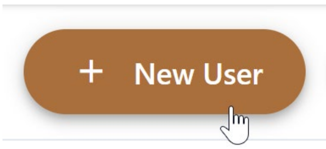
Users/Groups

Adding user

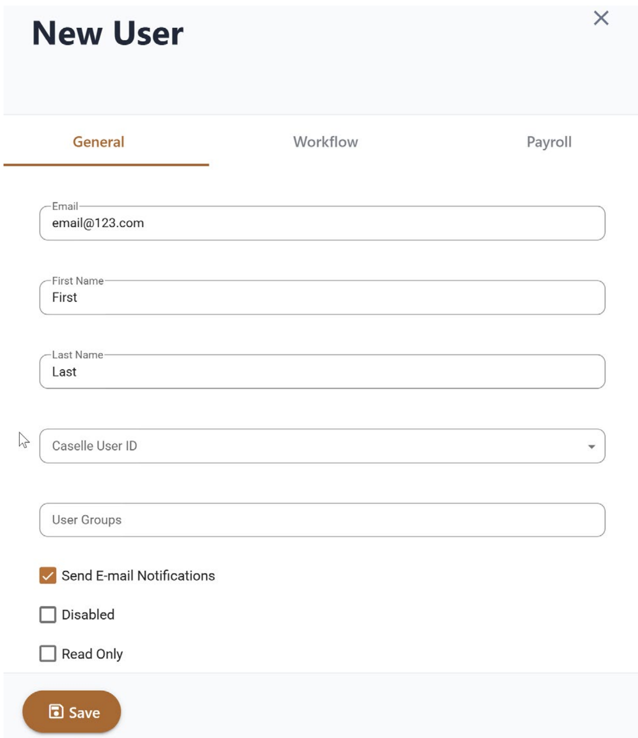
To add a user, go to Administration > Users.



Select New User.



Enter the email address, first name, last name, and caselle user (if applicable). Caselle User is only required for certain tasks, so this can be left blank.



We recommend checking Send Email Notifications.

If you know the user group this new user should be in, you can add that miViewpoint User Group also.

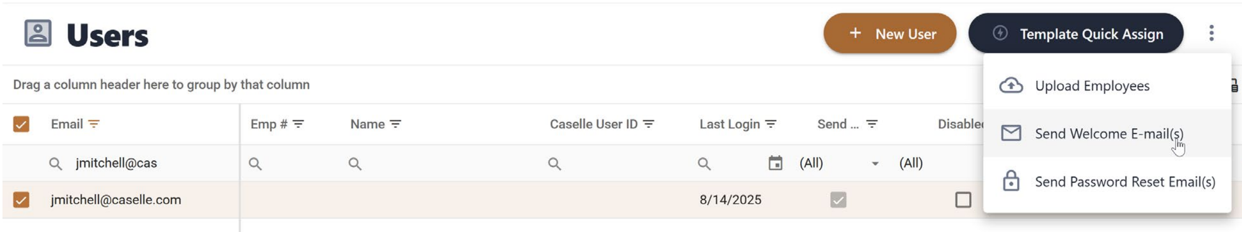
Click 'Save'

Welcome Email

After you add a user, you must send them a welcome email so they can set up their password and verify their email address. The email will originate from noreply@miviewpoint.net. It will contain a link to click on so that the user can confirm their email address and set their initial password.

Sending Welcome Email

After adding a user in Administration > Users, select the checkbox next to the user/s you wish to send a Welcome Email to. Select the 3 dots and click Send Welcome Email.

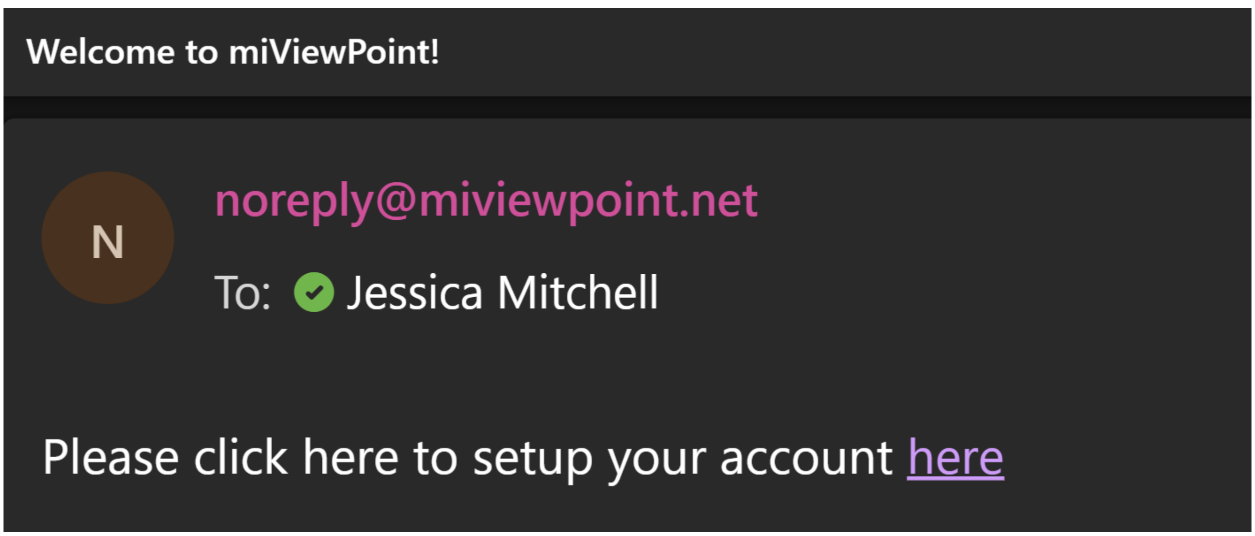


- **Please note**: The links in the Welcome Email expire after 3 days. If someone does not complete the link before it expires, you can simply resend another Welcome Email the same way as before.

Completing Welcome Email

To confirm your email address and set your password follow these steps:

1. Open the **Welcome Email** sent to you from noreply@miviewpoint.net and click on the link.



Please Note: Bookmark this website so you can log in later.

2. Enter your email address and password in the **Password** field and confirm your password in the **Confirm password** field. Below are the password requirements.

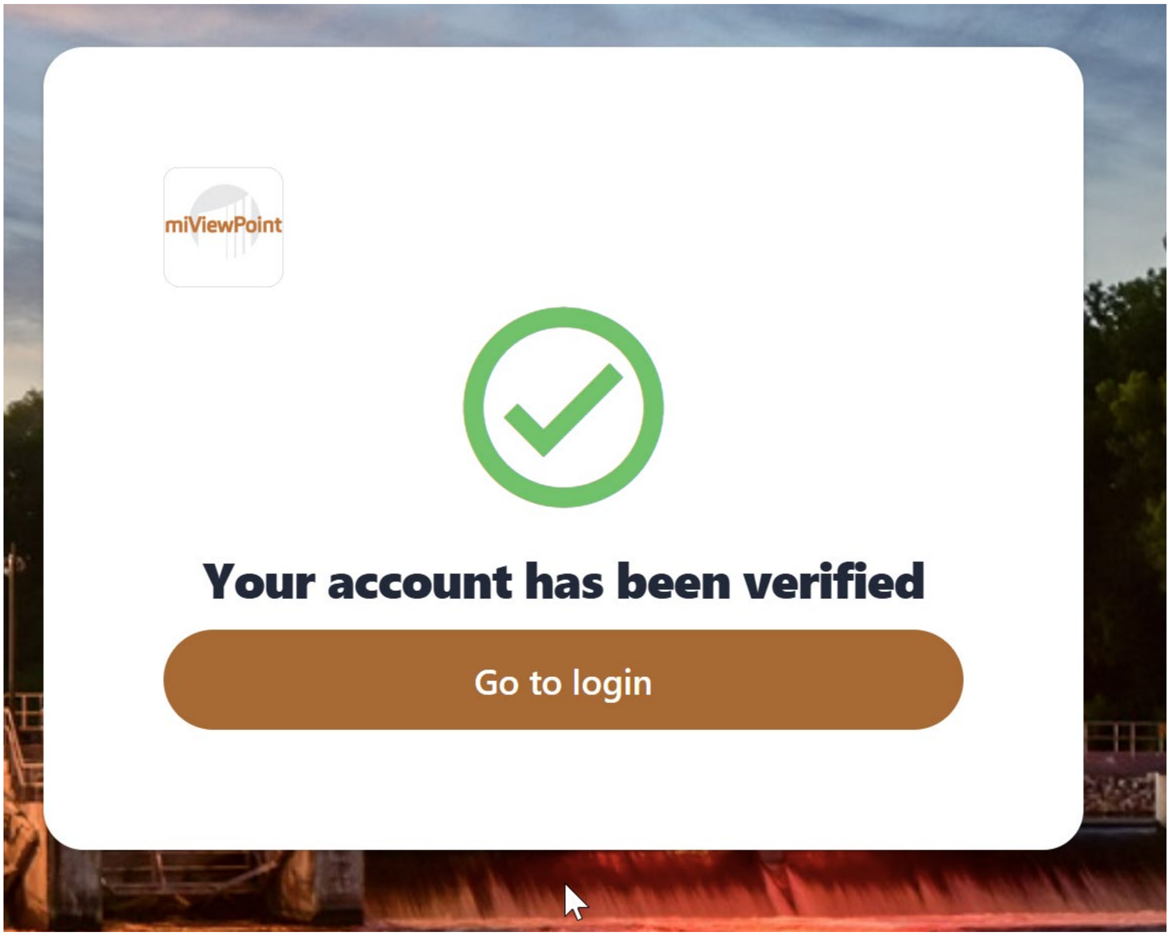
- Password must be at least 8 characters
- Password must have an uppercase character
- Password must have an lowercase character
- Password must have a number
- Password must have on of the following symbols $*.[\]
{}()?"!@#%&/\\,><':;|_~`
- Passwords must match

3. Click **Sign In**.
4. You will receive an additional email asking you to verify your email address.
   Click the link to verify your email.

   In order to login and start using miViewPoint you need to verify your email address. Please use the link below.

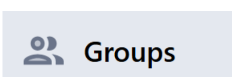
   Click here to verify your miViewPoint email

5. Your account has been verified!



6. You can now log into miViewpoint.

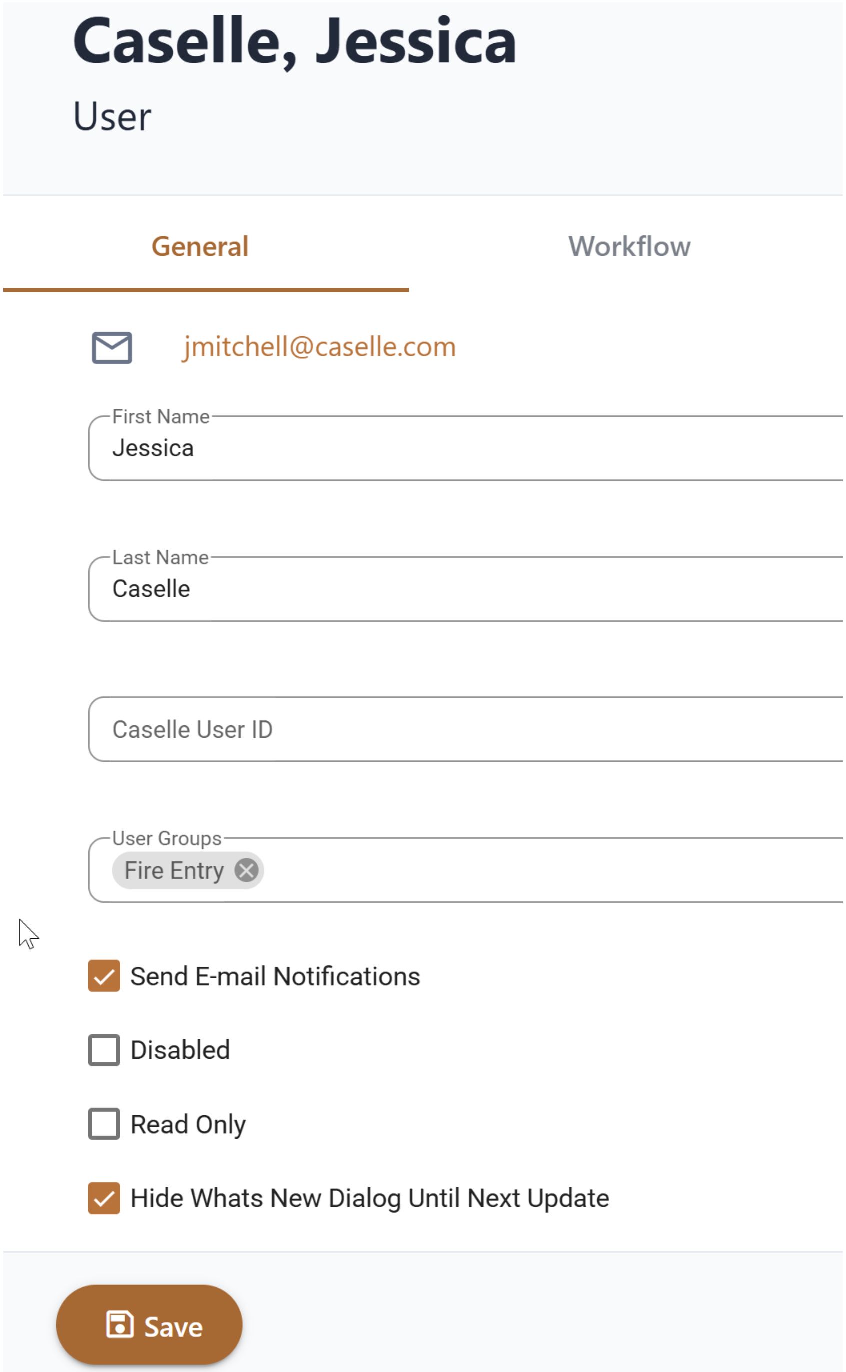
Groups



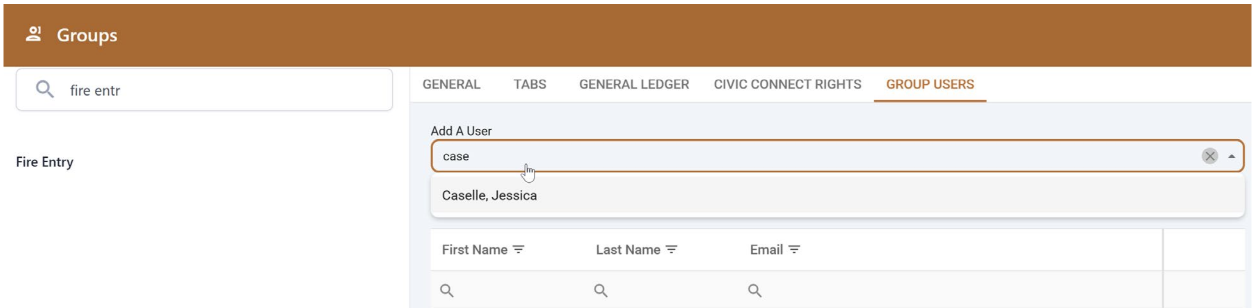
Adding a user to a group

In miViewpoint, permissions are determined by the group/s they are in.

To add a user to a group, you can navigate to Administration | Users, select the user, add a User Group and click Save.



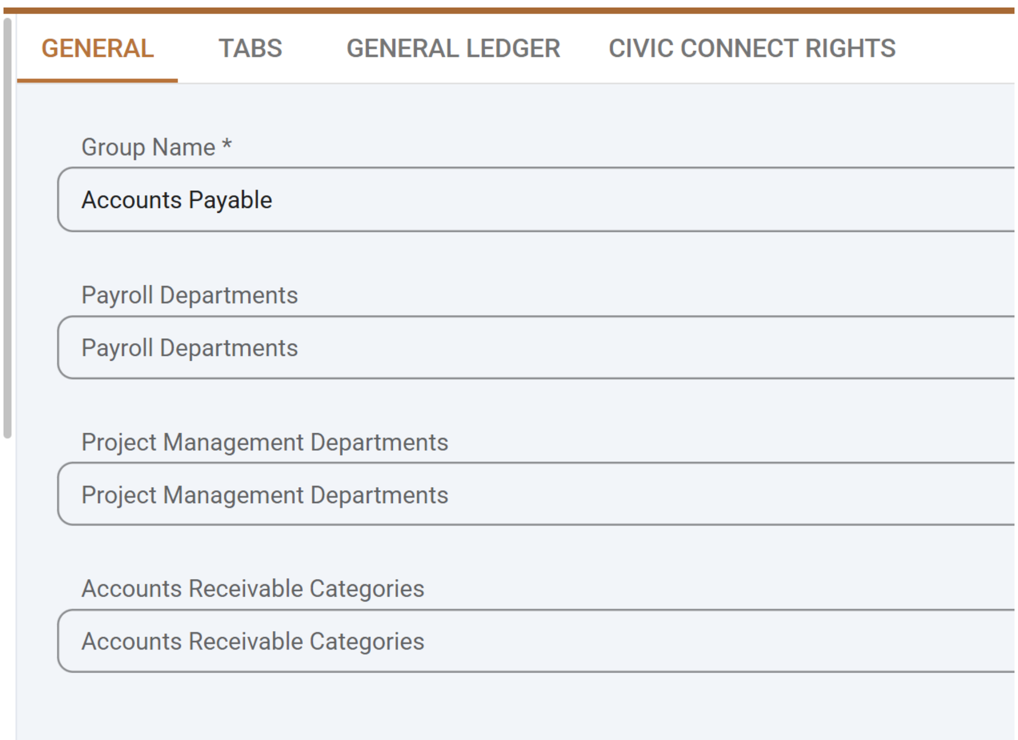
You can also add a user to a group under the Groups screen. Go to Administration | Groups, select the group you would like the user to be in. Click the Group Users tab. Type in the name of the user you want to add. Select them from the dropdown. Remember to click Save to apply your changes.



Creating a Group

Go to Administration | Groups. Select Add New from the bottom of the screen.

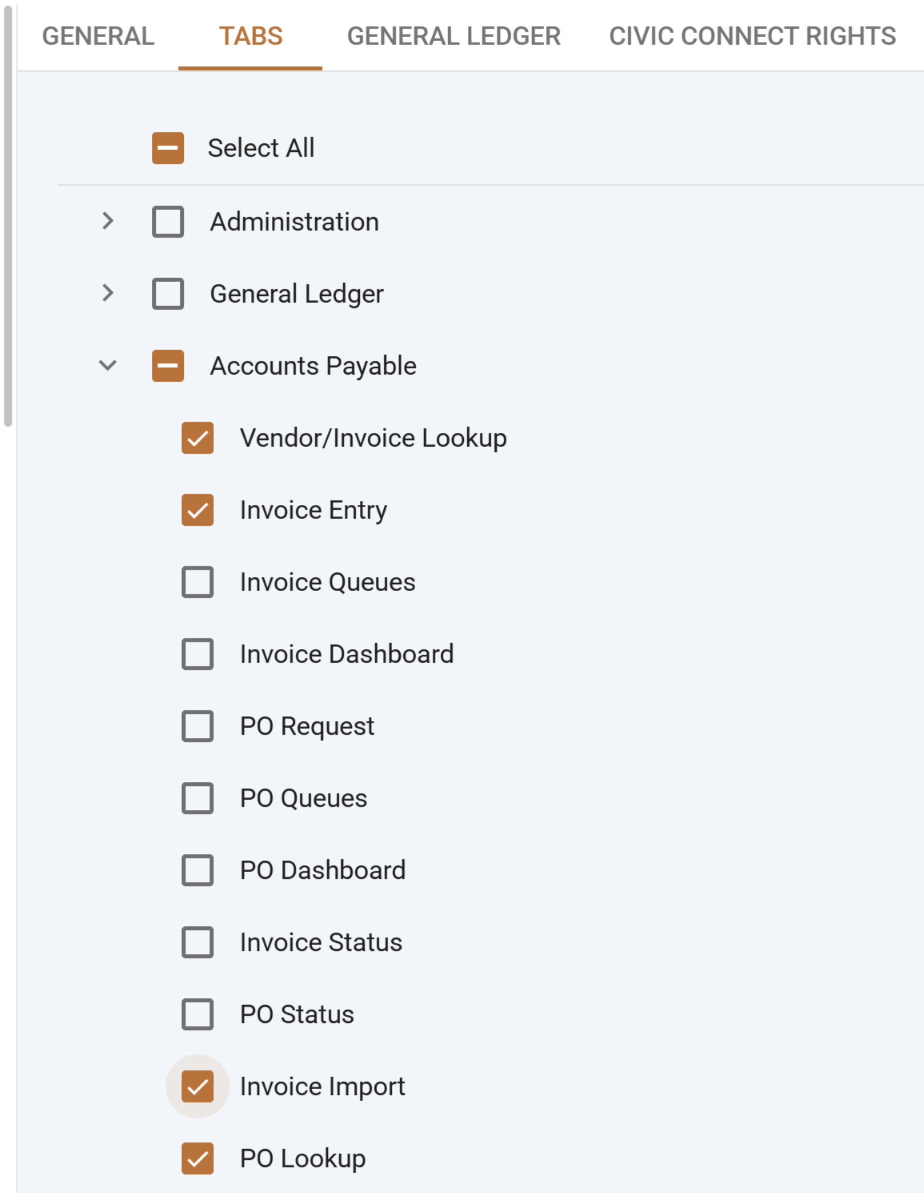
On the General Tab, enter in the Group Name.



Enter in other fields (if applicable).

Go to the Tabs option.

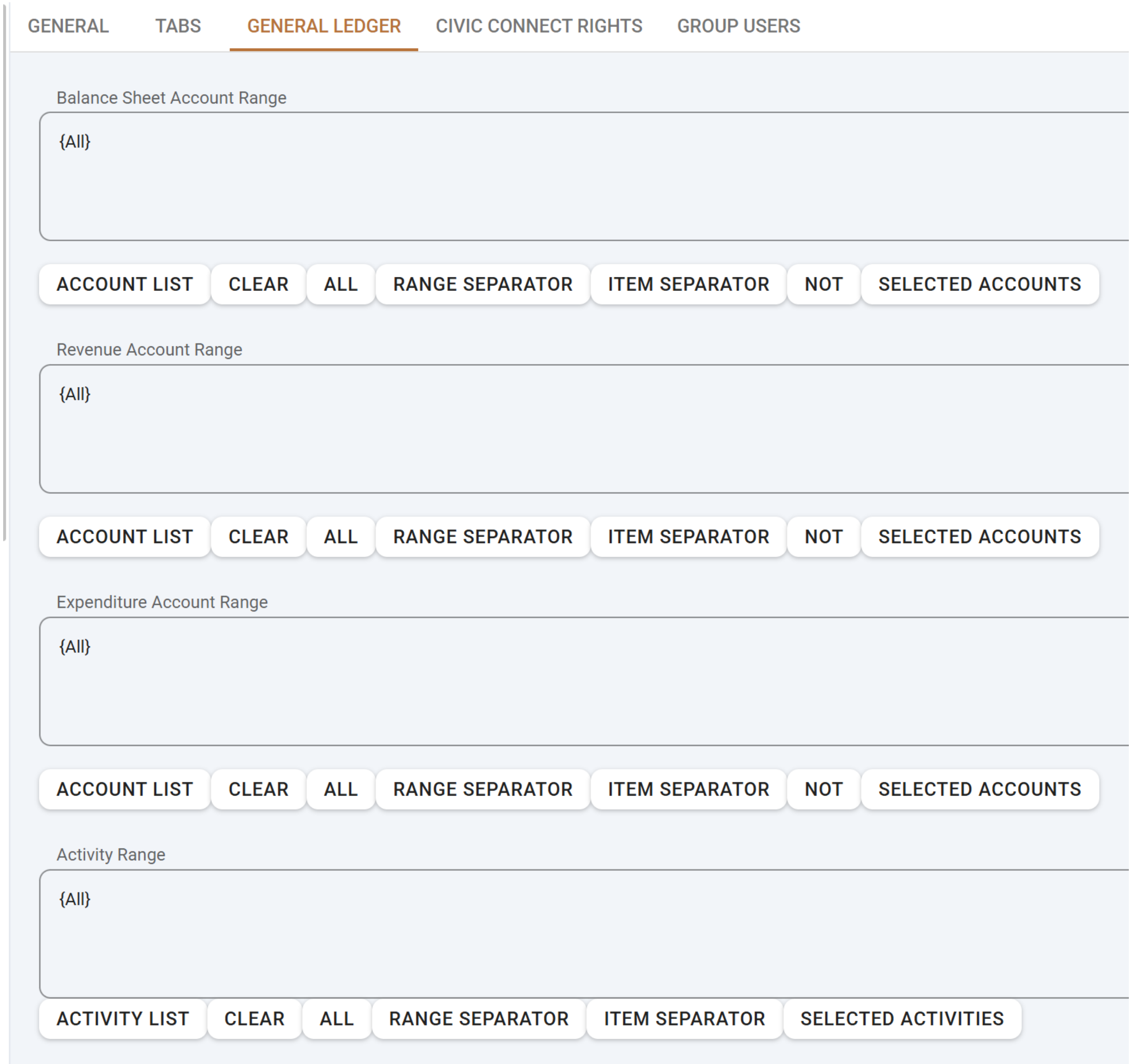
TABS is where you can select which buttons you want users in this group to have access to. For example, in the below, these users would have access to Accounts Payable | Vendor Invoice Lookup, Invoice Entry, Invoice Import, and PO Lookup. Anything that is NOT checked means users in this group will not see those tabs available when they log into miViewpoint. They will only see tabs that they have access to.



General Ledger tab

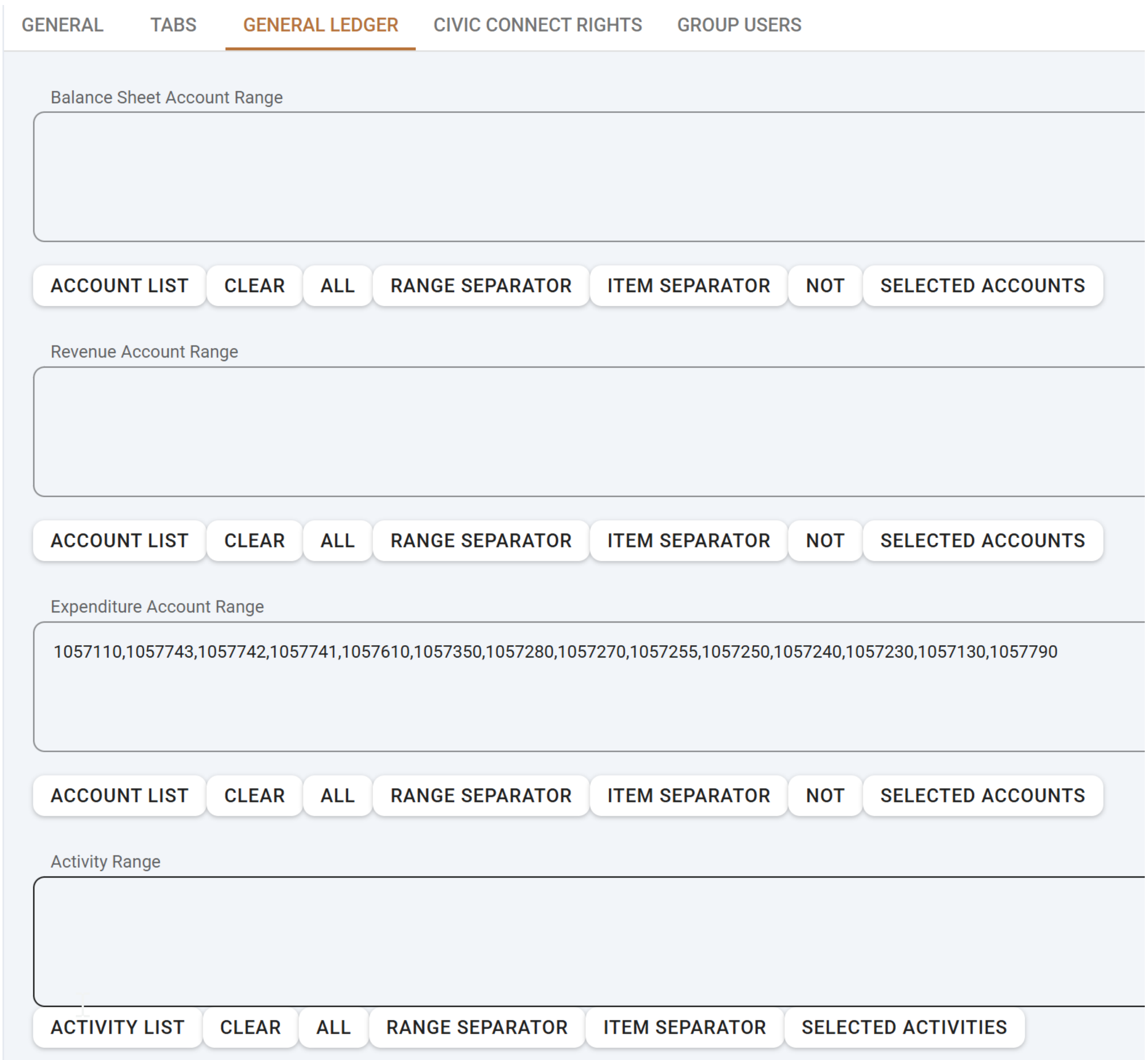
The General Ledger tab for the groups is where you can pick which General Ledger accounts users in a group should be able to have access to. This applies to Entry screens as well as lookup screens.

If you want someone to have access to ALL GL Accounts, you would click ALL. 

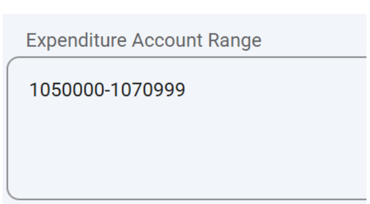


If you want groups to only have access to some accounts, you would specify that on this tab.

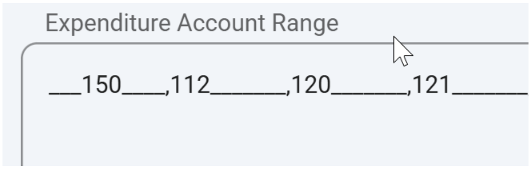
In the below example, users in this group would only have access to the specified expenditure accounts listed.



You can separate by commas (like in the example above) or you can add a range of accounts when needed (see below).

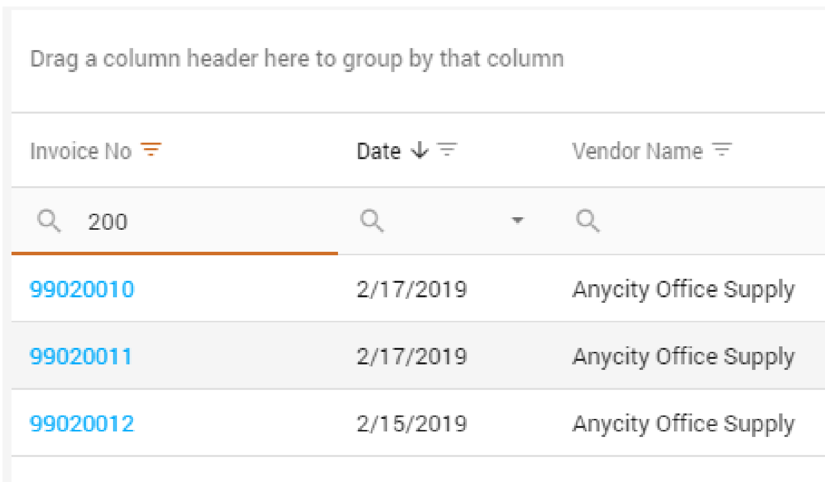


You can also choose to mask the accounts list (see below). You can do this by placing an underscrore for each character you do not list.

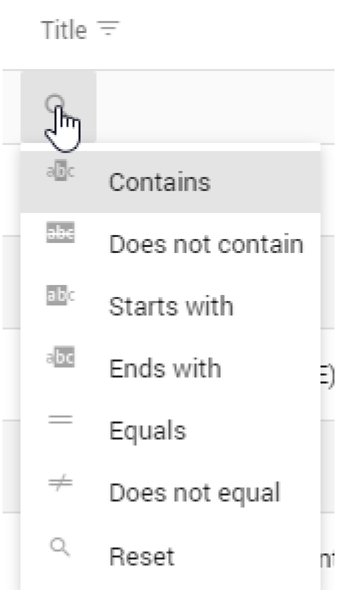


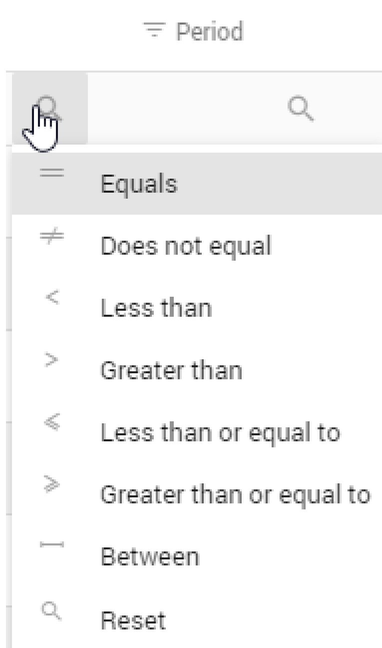
Filtering

You can filter a screen's grid by typing in the space below the column headings. As you type, the grid will filter to only show what matches. For example, if you type "200" in the **Invoice No** filter, only those invoices with "200" in it will appear. No wildcards are necessary. The system will search through every part of the **Invoice No** in this example.

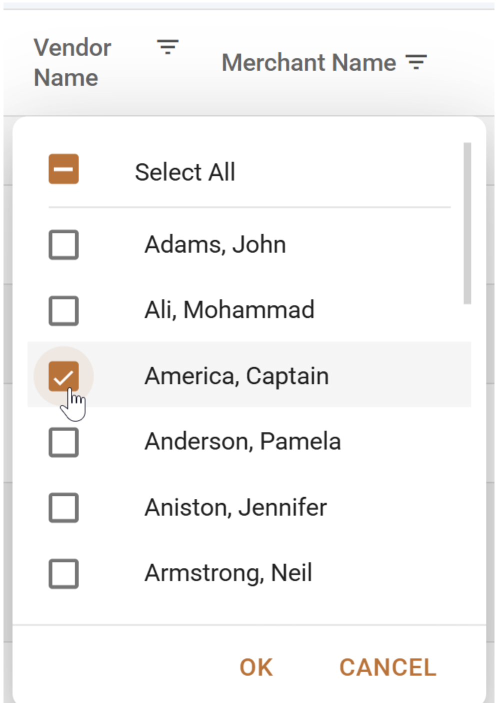


Additional filtering capabilities exist depending upon the type of column that it is. You can access these additional capabilities by hovering over the magnifying glass at the top of any column.





You can also click the 3 lines  *by a field to check boxes to filter by. For example, in the below this would filter to show me only vendor Captain America.*



<u>Export Data</u>

You have the ability to export the data in the different screens to Excel. Simply, click the **Export** button  found on the right side of the screen. Depending upon what browser you are using, you may have a couple more steps to follow to export the data into Excel.

<u>Drill-Down</u>

Fields within a grid that appear in a blue or red font are hyperlinks. These hyperlinks will allow you to drill-down to get more information. Depending upon what hyperlink you click on, the information provided in the drill-down will vary.

Column Chooser

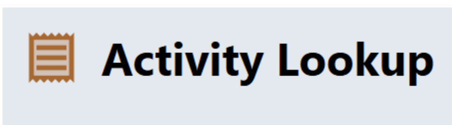
You can customize columns on lookup screens by adding or removing columns. Simply, click the Column Chooser button  found on the right side of the screen. A pop-up will appear providing you with a list of additional columns that can be added to the grid. Add a column by clicking and dragging it into the appropriate place in the Watch List grid. Alternatively, you can remove a column by clicking and dragging the column from the grid back into the Column Chooser list.

General Ledger

Account Lookup

The Account Lookup provides a list of all account numbers you have been granted access to view. This grid allows you to monitor the balances and activity of each account. To access the Account Lookup, move your mouse to the left so that the menu slides out and select General Ledger | Account Lookup

Activity Lookup



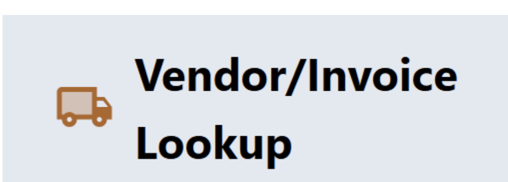
The Activity Lookup provides a list of all activity numbers you have been granted access to view. This grid allows you to monitor the balances and activity of each activity. To access the Activity Lookup, move your mouse to the left so that the menu slides out and select General Ledger | Activity Lookup.

Journal Lookup

The Journal Lookup provides a list of all transactions recorded to a specified journal code. Only those transactions recorded to accounts that you have been granted access will appear. To access the Activity Lookup, move your mouse to the left so that the menu slides out and select General Ledger | Journal Lookup.

Accounts Payable

Vendor/Invoice Lookup

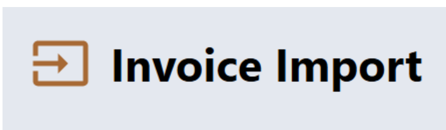


The Vendor/Invoice Lookup provides you with the ability to lookup invoices that have been entered into Accounts Payable. To access the Vendor/Invoice Lookup, move your mouse to the left so that the menu slides out and select Accounts Payable | Vendor/Invoice Lookup.

PO Lookup

PO Lookup provides you with the ability to lookup purchase orders to view their status, the invoice tied to the purchase order, print the purchase order, and more. To access the PO Lookup, move your mouse to the left so that the menu slides out and select Accounts Payable | PO Lookup.

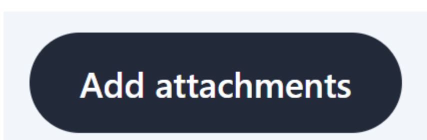
Invoice Import



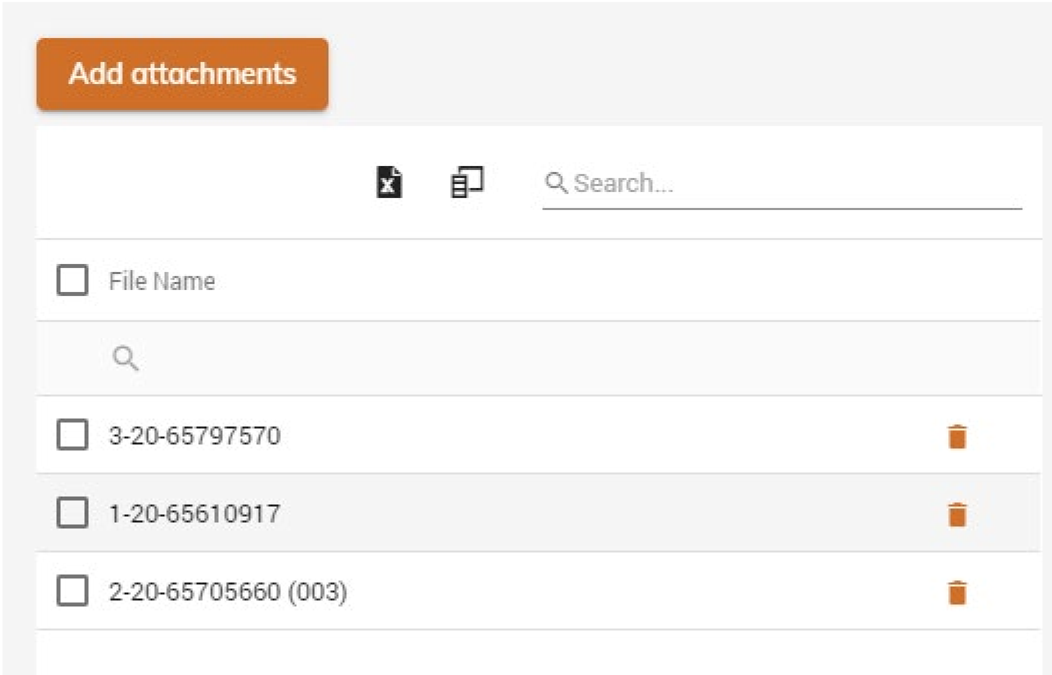
Invoice Import provides the ability to attach a scanned image of the invoice after the invoice has been entered and processed.

To attach an image of the invoice, follow these steps:

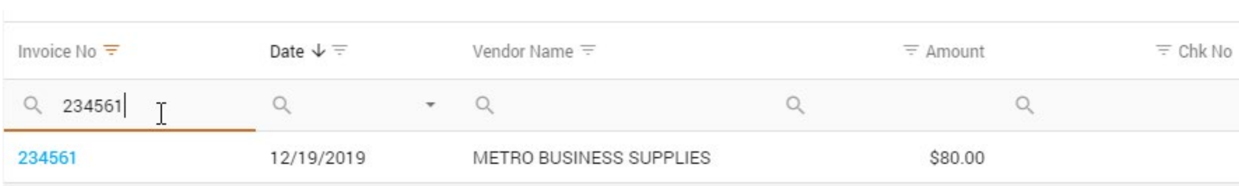
1. Select Invoice Import
2. Click **Add attachments** at the top.



3. Browse to find the invoices you want to attach. You can select more than one invoice by using the Shift and Control keys. Click **Open** when ready. Alternatively, if you have File Explorer or an email open, you can click and drag the file into the area that says **No data**.



4. After the images have been added, click on any file. The invoice will be rendered on the right side of the screen and the check box to the left of the file name will be checked.
5. You can then use the filter fields below the column headings to find the invoice you would like to attach the image to. For example, you can type the invoice number into the **Invoice No** filter field.



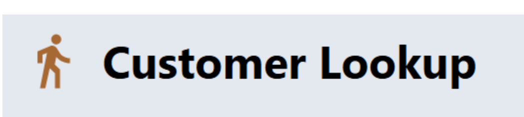
6. Once you find the invoice, click on the appropriate line in the grid.
7. Make sure the correct image from step 3 is checked. Click **Link**.

The image will now be viewable from **Account Lookup** and **Vendor/Invoice Lookup**.

8. Repeat steps 4 – 7 for each image.

Accounts Receivable

Customer Lookup



Customer Lookup provides you with the ability to lookup a customer to view billing and payment history and see what invoices are outstanding. To access the Customer Lookup, move your mouse to the left so that the menu slides out and select Accounts Receivable | Customer Lookup.

Category Lookup

Category Lookup provides you with the ability to lookup what customers have outstanding invoices for a specific billing category. To access the Category Lookup, move your mouse to the left so that the menu slides out and select Accounts Receivable | Category Lookup.

Discuss Reports with remaining time and address questions