
miViewpoint- Basic

Symposium- 2025



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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.



Sign in

Email address*

Password*



[Forgot password?](#)

Sign in

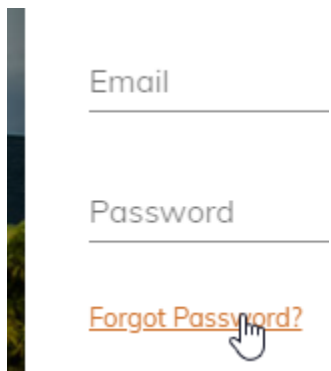
Resetting Your Password

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.

[Forgot password?](#)



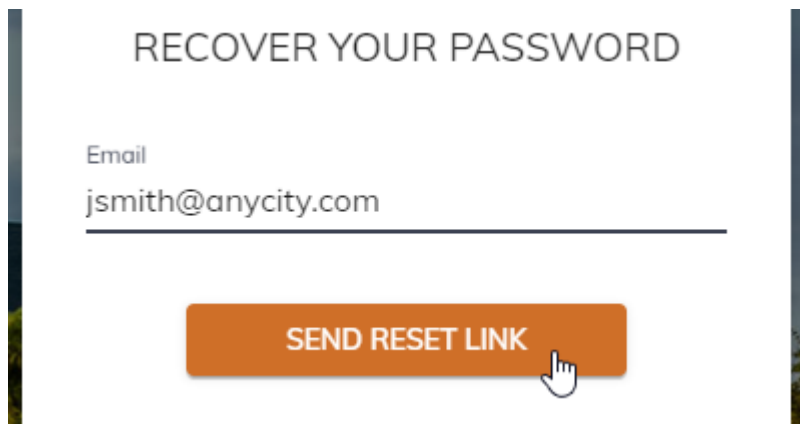


Email

Password

[Forgot Password?](#)

3. Enter your email and click Send Reset Link.



RECOVER YOUR PASSWORD

Email

jsmith@anycity.com

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.

- ✓ 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

Password

Confirm Password

- ✓ 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 one of the following symbols \$*.[\]{}()?"!@#%&/\, > < ' ; | _ ~ `
- ✓ Passwords must match

Sign in

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.

What's New

3.0.25.15542

AR Inquiry - add invoice number to payment applied lines
Civic Connect - GL import add validation error for inactive jobs
UM Inquiry - add customer notes
AP New Vendor - populate recipient name
GL Budget - add approve confirmation
GL Budget - add ability to allocate a detail item to a GL activity
AP New Vendor - display submitted date, approved date, approved by
AP New Vendor - add prompt to confirm submission when address/city already exists
Workflow Emails - allowing hiding approve / reject buttons
Invoice Entry - allow coding template to allocate by a percentage
Invoice Entry - allow steps to be skipped when a PO is linked
Invoice / PO Entry - improve loading speed and add word wrap
Pending Payments - show most recent error message, if any

3.0.22.13498



CLOSE

Display and Navigation Settings



Toggle Fullscreen-

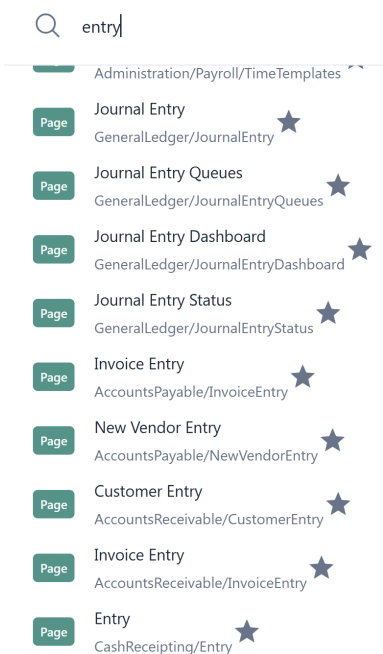


This icon allows your miViewpoint screen to expand to full screen. To enter/exit full screen mode, simply click the icon.

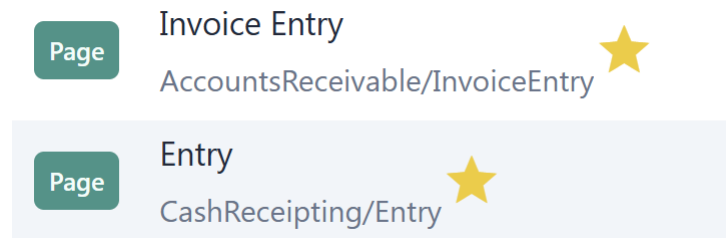
Adding Shortcuts-



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.



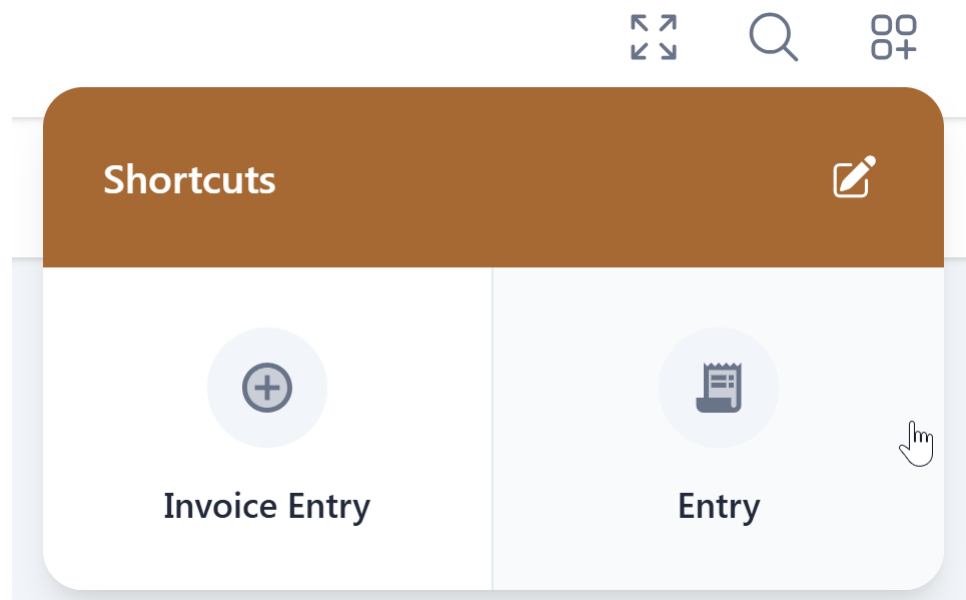
When you click the star, that star becomes yellow symbolizing that this has been added as a shortcut.



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.

Notifications



Archive all





Civic Services Not Connected

Failed to authorize Civic secure services. Please contact Civic...

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


Notifications






Civic Services Not Connected

Failed to authorize Civic secure services. Please contact Civic...



Archive



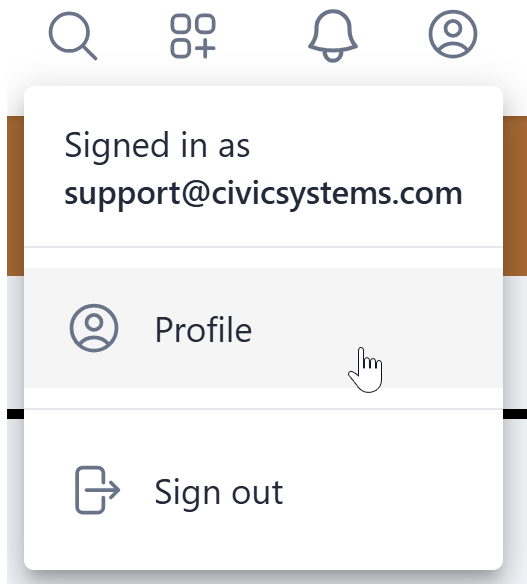
Update Failed

An update failure has been detected. Please check updater...

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.

Account

My Info

Settings

General

Email*

youremail@gmail.com

Phone Number

☐ Opt In to Text Message Alerts

Save

Two Factor Authentication

Click below to add or change two factor auth settings

SMS/Text Message

✓

✕

▼

MFA App (eg: Google)

✓

✕

▼

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.

My Info

Settings

Out of Office

Assign user to access your workflows and approvals while you are out of office.

☐

Assign out of office user

Settings

☐ Workflow - Show Popup Window for GL Detail Entry

☐ Invoice Workflow - Do Not Reset Vendor On Invoice Submission

☐ Use Browser's Built-in PDF Viewer

Default AR Form

Select a form

Save

Profile- Layouts

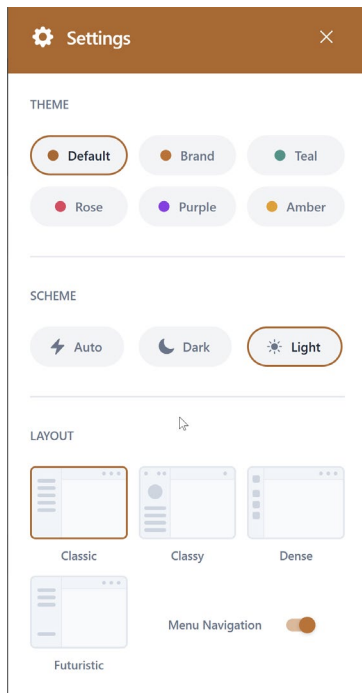
This tab provides the ability to remove filtered settings within your profile. You can do this by clicking on the trash can across the grid name. This only removes filters from the screen, and deleting layout filters will not delete your data. This is a helpful tool if you feel that you are not seeing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

Workflow		Layouts	
Search...			
File Name			
watchListGrid			
glSummaryGrid			
glDetailGrid			

Settings



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



Home Screen

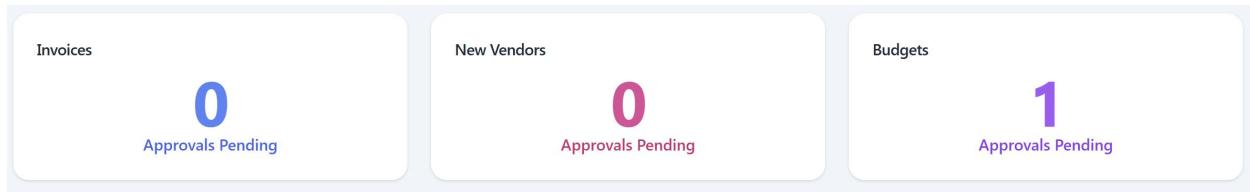
After logging in, you will land on the Home page. The Home page communicates items in your queue awaiting your approval and shows any accounts in your Watch List.

The Home Screen is titled 'CITY OF ANYCITY DEPARTMENTAL PORTAL' and features the Civicsystems logo. A message states: 'This portal provides you with critical information related to your department such as budget to actual, invoices waiting to be paid, employee information and much more!'. Below this are three summary cards: 'Invoices' with '2 Approvals Pending', 'New Vendors' with '0 Approvals Pending', and 'Budgets' with '1 Pending'. The 'Watch List' section is a table with a dark header and a light body. It includes a 'Period End Date' dropdown set to '03/19 (3/31/2019)', a search bar, and a table with columns for Account Header, Account No, Title, Period, YTD, Budget, and Watch List. The table contains two rows of data.

Account Header	Account No	Title	Period	YTD	Budget	Watch List
GENERAL FUND - PA...	10-50-255	Fuel & Oil (E)	\$683.69	\$928.01	\$945.00	Remove
GENERAL FUND - PO...	10-54-110	Salaries & Wages (E)	\$8,710.76	\$83,802.88	\$107,000.00	Remove

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.

The figure shows a 'Watch List' header with a dark background. Below it, there is a 'Period End Date' label and a dropdown menu. The dropdown menu is open, showing a list of dates. The current selected date is '03/19 (3/31/2019)', which is highlighted in grey. A hand cursor is pointing at this option. The other options in the dropdown are '04/19 (4/30/2019)', '02/19 (2/28/2019)', and '01/19 (1/31/2019)'.

Period End Date
03/19 (3/31/2019)
04/19 (4/30/2019)
03/19 (3/31/2019)
02/19 (2/28/2019)
01/19 (1/31/2019)

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 is 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.

Watch List ▾


Remove


Users/Groups


Adding user

To add a user, go to Administration > Users.

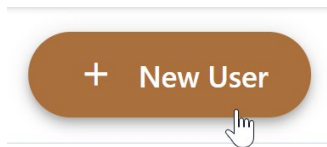
Users and Groups

 Users

 Groups

 Api 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.

New User

General

Workflow

Payroll

Email

email@123.com

First Name

First

Last Name

Last

Caselle User ID

User Groups

☒ Send E-mail Notifications

☐ Disabled

☐ Read Only

Save

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.

Users

Drag a column header here to group by that column

Email	Emp #	Name	Caselle User ID	Last Login	Send ...	Disable
jmitchell@cas					(All)	(All)
jmitchell@caselle.com				8/14/2025		

Send ...

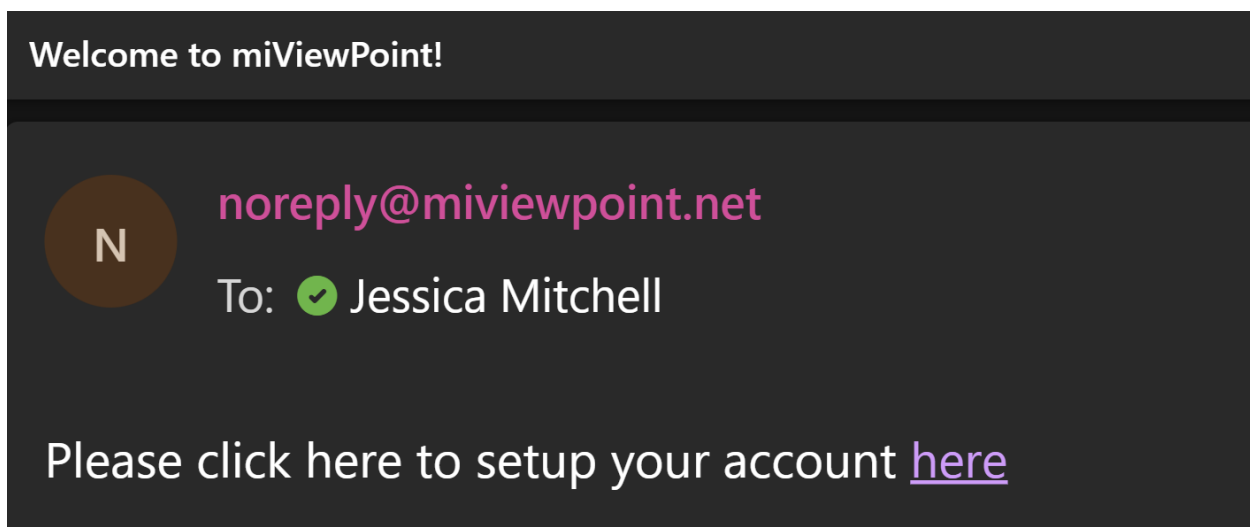
- Upload Employees
- Send Welcome E-mail(s)
- Send Password Reset Email(s)

- **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

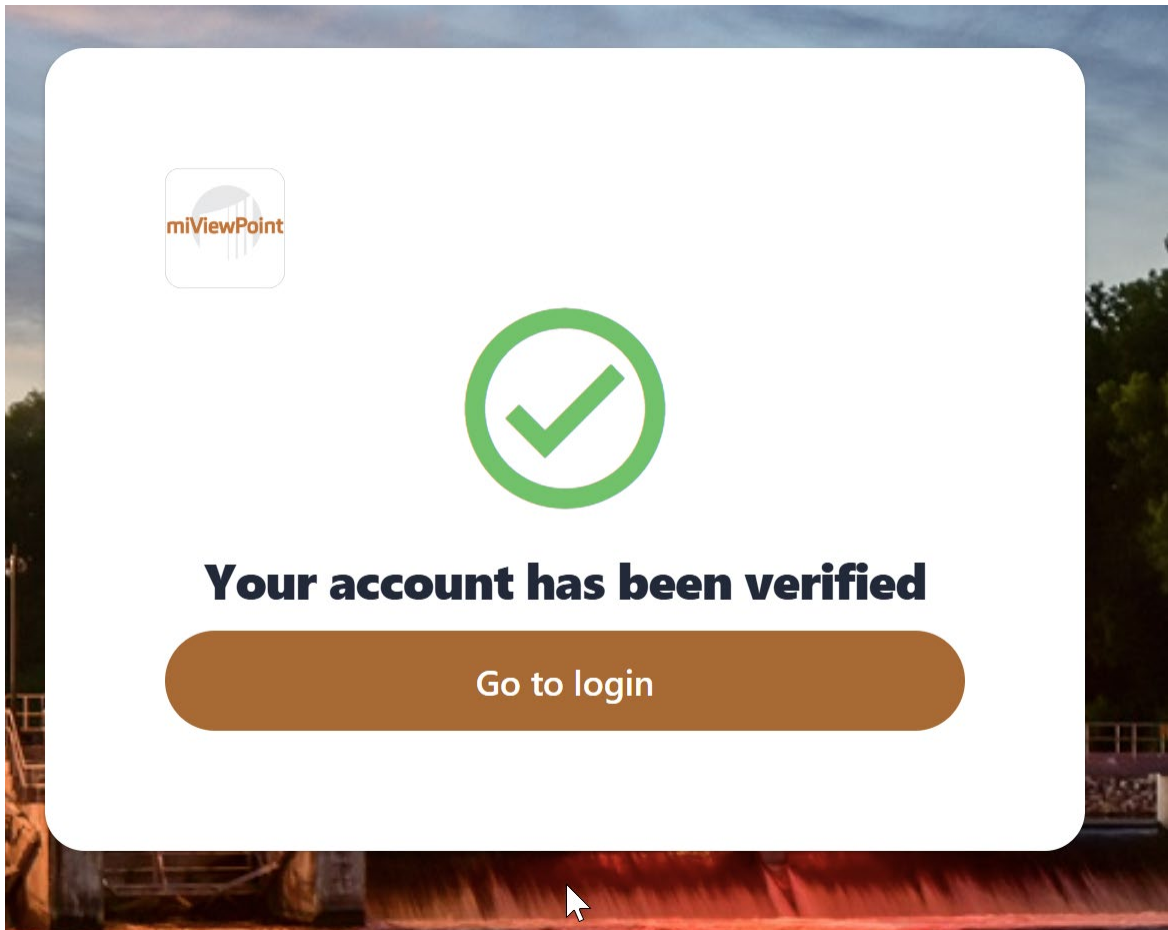
3. Click **Sign In**.

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.

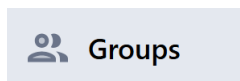
[Click here to verify your miViewPoint email](#)

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.

Caselle, Jessica

User

General

Workflow



jmitchell@caselle.com

First Name


Jessica

Last Name

Caselle

Caselle User ID

User Groups

Fire Entry 

☒ Send E-mail Notifications

☐ Disabled

☐ Read Only

☒ Hide Whats New Dialog Until Next Update

 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

TABS

GENERAL LEDGER

CIVIC CONNECT RIGHTS

—

Select All

> ☐ Administration

> ☐ General Ledger

∨

—

Accounts Payable

✓

Vendor/Invoice Lookup

✓

Invoice Entry

☐ Invoice Queues

☐ Invoice Dashboard

☐ PO Request

☐ PO Queues

☐ PO Dashboard

☐ Invoice Status

☐ PO Status

✓

Invoice Import

✓

PO Lookup

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.



GENERAL

TABS

GENERAL LEDGER

CIVIC CONNECT RIGHTS

GROUP USERS

Balance Sheet Account Range

{All}

ACCOUNT LIST

CLEAR

ALL

RANGE SEPARATOR

ITEM SEPARATOR

NOT

SELECTED ACCOUNTS

Revenue Account Range

{All}

ACCOUNT LIST

CLEAR

ALL

RANGE SEPARATOR

ITEM SEPARATOR

NOT

SELECTED ACCOUNTS

Expenditure Account Range

{All}

ACCOUNT LIST

CLEAR

ALL

RANGE SEPARATOR

ITEM SEPARATOR

NOT

SELECTED ACCOUNTS

Activity Range

{All}

ACTIVITY LIST

CLEAR

ALL

RANGE SEPARATOR

ITEM SEPARATOR

SELECTED ACTIVITIES

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.

Balance Sheet Account Range

ACCOUNT LIST CLEAR ALL RANGE SEPARATOR ITEM SEPARATOR NOT SELECTED ACCOUNTS

Revenue Account Range

ACCOUNT LIST CLEAR ALL RANGE SEPARATOR ITEM SEPARATOR NOT SELECTED ACCOUNTS

Expenditure Account Range

ACCOUNT LIST CLEAR ALL RANGE SEPARATOR ITEM SEPARATOR NOT SELECTED ACCOUNTS

Activity Range


ACTIVITY LIST CLEAR ALL RANGE SEPARATOR ITEM SEPARATOR SELECTED ACTIVITIES

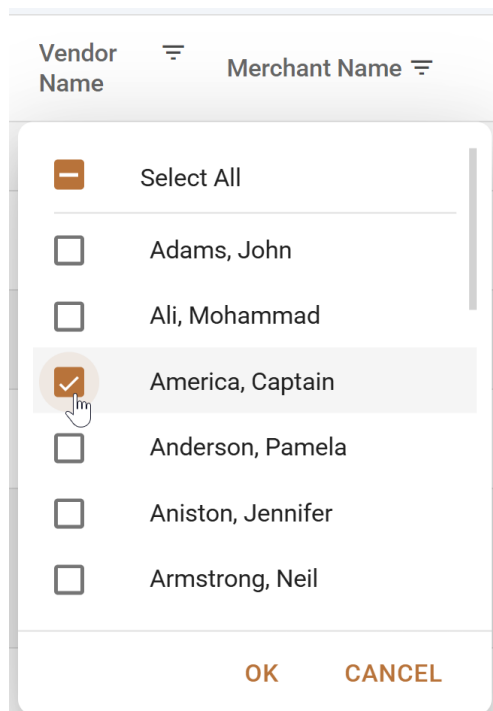
You can separate by commas (like in the example above) or you can add a range of accounts when needed (see below).

Expenditure Account Range

1050000-1070999


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

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.



Export Data


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.

Drill-Down

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



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



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



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



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.

A dark blue rounded rectangular button with the text "Add attachments" in white font.

Add attachments

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**.

Add attachments

Search...

☐ File Name

☐ 3-20-65797570

☐ 1-20-65610917

☐ 2-20-65705660 (003)

- 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.
- 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.

Invoice No	Date	Vendor Name	Amount	Chk No
234561	12/19/2019	METRO BUSINESS SUPPLIES	\$80.00	

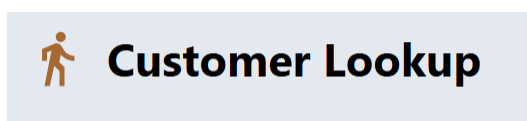
- Once you find the invoice, click on the appropriate line in the grid.
- Make sure the correct image from step 3 is checked. Click **Link**.

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

- 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

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