25ᵗʰ 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 8, 8:30am – 10:00am (Virtual)

Accounts Payable – New User
Monday, September 8, 10:30am – 12:00pm (Virtual)

Payroll – New User *(double session)*
Monday, September 8, 12:30pm – 4:00pm (Virtual)

Utility Billing – New User *(double session)*
Tuesday, September 9, 8:30am – 12:00pm (Virtual)

Accounts Receivable – New User
Tuesday, September 9, 12:30pm – 2:00pm (Virtual)

IN-PERSON SESSIONS next page.

25ᵗʰ Annual Symposium

Session Descriptions

Financial Sessions (In-Person)

Bank Reconciliation

Thursday, September 11, 10:15am – 11:15am

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

miViewPoint Basics

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

Explore the options of getting data to your departments live with miViewpoint! This session will introduce you to the basic features of miViewPoint (General Ledger Account Lookup, Vendor Lookup, Utility Customer Lookup, Payroll Lookups and Reports). We will review the setup of users and groups.

Cash Allocations

Thursday, September 11, 1:45pm – 3:00pm

Discover the power and automation of pooled cash and cash allocations. This session will introduce you to what cash allocations are, the setup of cash allocation journal codes and troubleshooting cash allocation errors and out of balance amounts.

miViewPoint Accounts Receivable & Cash Receipting

Thursday, September 11, 3:15pm – 4:15pm

Learn how to allow multiple departments to enter receipts and accounts receivable invoice remotely! This session will introduce you to the cash receipting and accounts receivable capabilities within miViewpoint including entry, inquiry and reports.

miExcel/Civic Connect

Thursday, September 11, 3:15pm – 4:15pm

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 12, 8:30am – 9:30am

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.

25th Annual Symposium

Session Descriptions

Year End Accounts Payable & General Ledger
Friday, September 12, 9:45am – 10:45am

Take the stress out of the year end process; start preparing now! This session will preview the year end steps for both Accounts Payable and General Ledger. We will review the timelines and processes of the steps to allow you to be best prepared for year end, including 1099s, registering for federal and state websites, cash versus accrual, year end reports and closing year end.

Journal Entries
Friday, September 12, 11:00am – 12:00pm

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.

miViewPoint Accounts Payable
Friday, September 12, 11:00am – 12:00pm

Discover how to route invoices through an electronic approval process with electronic copies of your invoices. We will walk through the process of entering, editing and approving invoices. We will show you how departments can request new vendors be set up. We will walk through the setup of the approval workflows.

Payroll Sessions (In-Person)

Pay Codes and Calculations
Thursday, September 11, 10:15am – 11:15am

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.

Payroll Reporting
Thursday, September 11, 11:30am – 12:30pm

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.

25th Annual Symposium

Session Descriptions

Managing Employee Records
Thursday, September 11, 11:30am – 12:30pm

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.

Payroll General Troubleshooting
Thursday, September 11, 1:45pm – 3:00pm

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, employees that were missed on the payroll, how to handle checkout errors, and much more.

Leave Time
Thursday, September 11, 12: 3:15pm – 4:15pm

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.

Troubleshooting miPayOnline with Open Enrollment
Friday, September 12, 8:30am – 9:30am

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 capabilities of open enrollment for benefits through miPay.

miExcel Payroll
Friday, September 12, 9:45am – 10:45am

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.

Troubleshooting miTime
Friday, September 12, 9:45am – 10:45am

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.

25th Annual Symposium

Session Descriptions

Year End Payroll
Friday, September 12, 11:00am – 12:00pm

Take the stress out of the year end process; start preparing now! This session will preview the year end steps for Payroll. We will review the timelines and processes of the steps to allow you to be best prepared for year end, balancing reports, reviewing pay codes and employees, registering for Federal and State websites, processing W-2s.

Utility Billing Sessions (In-Person)

Managing Customer Records I
Thursday, September 11, 10:15am – 11:15am

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 11, 11:30am – 12:30pm

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.

NSF Checks/Payment Adjustment Options
Thursday, September 11, 1:45pm – 3:00

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.

Service Orders
Thursday, September 11, 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 of how this module can help your office be more efficient and effective.

Citizen Portal Utility Payments
Friday, September 12, 8:30am – 9:30am

Get paid faster! Learn how to use Citizen Portal to send utility bills to customers electronically and allow customers to pay online without creating more work for you. We will explore additional electronic ways to communicate with your customers (via mass emails or text messages).

25th Annual Symposium

Session Descriptions

Meter Management
Friday, September 12, 8:30am – 9:30am

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.

Utility Billing Reporting and Report Writer
Friday, September 12, 9:45am – 10:45am

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.

Tax Certification
Friday, September 12, 11:00am – 12:00pm

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.

Miscellaneous Sessions (In-Person)

Reporting – All Modules
Thursday, September 11, 10:15am – 11:15am

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.

Cash Receipting
Thursday, September 11, 10:15am – 11:15am

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.

Citizen Portal Accounts Receivable
Thursday, September 11, 11:30am – 12:30pm

Get paid faster! Learn how to use Citizen Portal to send invoices to customers electronically and allow customers to pay online without creating more work for you. We will explore how customers can see their invoice balances and pay for miscellaneous payment options.

25th Annual Symposium

Session Descriptions

Tips and Tricks – All Modules
Thursday September 11, 1:45pm – 3:00pm

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.

Report Writer All Modules (Duplicate Session)
Thursday, September 11, 1:45pm – 3:00pm

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 Building Permits
Thursday, September 11, 3:15pm – 4:15pm

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.

Forms – All Modules
Friday, September 12, 8:30am – 9:30am

This session will walk through how access forms within Connect and how to perform simple edits.   We will review new and old forms designer and some of the great new features that can help you like QR codes!

Citizen Portal – Interactive Web Forms
Friday, September 12, 9:45am – 10:45am

Learn about Citizen 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, taxes, etc. We will walk through how you can control which items can be processed, how to setup forms and accept payments.

Report Writer All Modules (Duplicate Session)
Friday, September 12, 11:00am – 12:00pm

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