

Advanced miViewPoint

This session will cover the departmental portal called miViewPoint which provides the tools department heads need to better run their department. We will cover tips and tricks on how to customize the look and feel of miViewPoint. We will cover how to troubleshoot when things go wrong like finding where an invoice is at in workflow, resetting filters, correcting invoices, balancing approved invoices with Connect and much more.

Customization

There are many ways to customize the miViewPoint site to a user's individual liking.

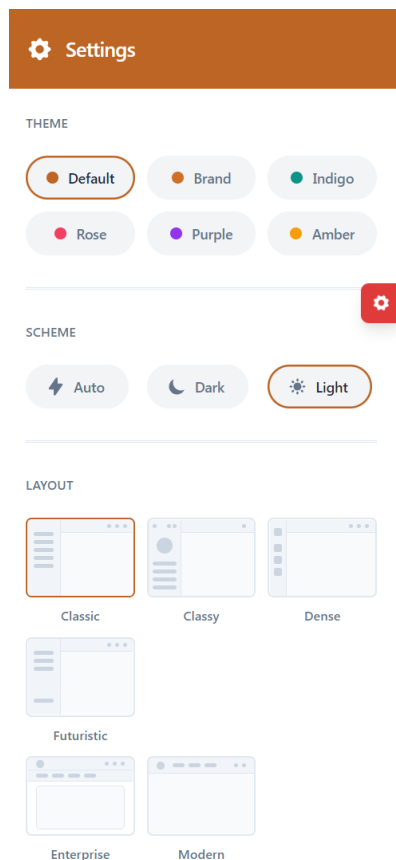
Site Look and Feel

The entire site can be changed to a user's color preference and menu preference. This is done using the

spinning sprocket on the right side of the screen

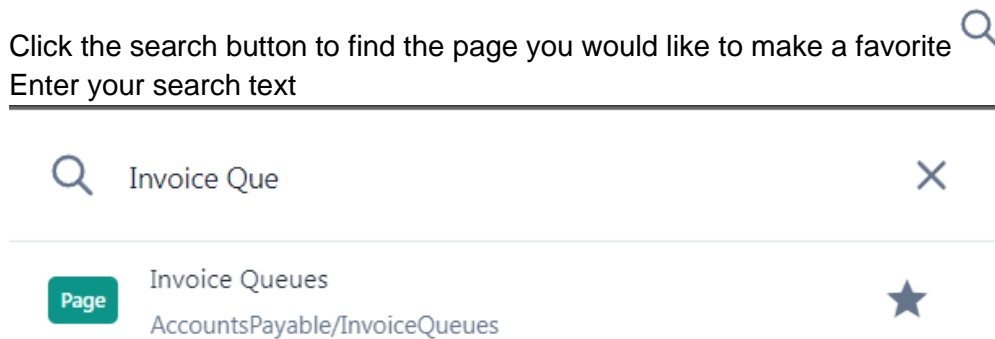


Users are given the option to change their color scheme as well as their menu layout. They can use the default vertical layout or if they have a small screen, they may prefer a horizontal layout with the menu along the top of the screen. These settings are saved per user.



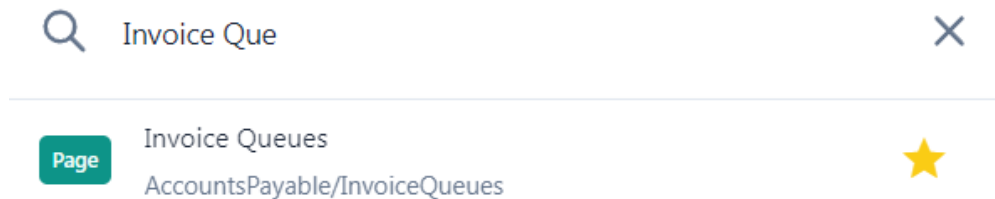
Once logged into the site users can create bookmarks to their favorite pages using the search icon to find the page and then the bookmark icon on the toolbar to go to those pages

1. Click the search button to find the page you would like to make a favorite
2. Enter your search text



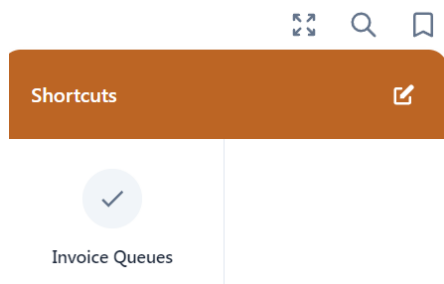
Search bar with text "Invoice Que" and a search icon. Below the search bar, a list of results is shown: "Invoice Queues" and "AccountsPayable/InvoiceQueues". A star icon is visible next to the results.

3. Click the star to make it a favorite



Search bar with text "Invoice Que" and a search icon. Below the search bar, a list of results is shown: "Invoice Queues" and "AccountsPayable/InvoiceQueues". A star icon is visible next to the results.

4. The next time you log in you can click the bookmark icon to find your favorites and click to go there



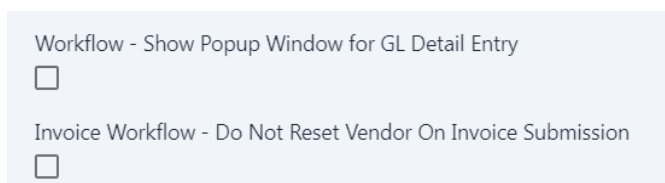
Toolbar with a search icon, a bookmark icon, and a "Shortcuts" button. Below the toolbar, a list of shortcuts is shown: "Invoice Queues".

5. The edit icon in the upper right corner can be used to remove a favorite

Workflow Settings

Users can change their workflow preferences on their profile page by clicking the person icon in the upper right corner

Users are given options to show a popup for detail entry on invoices / purchase orders and whether to reset the vendor when entering



Workflow Settings form with two checkboxes:

- Workflow - Show Popup Window for GL Detail Entry ☐
- Invoice Workflow - Do Not Reset Vendor On Invoice Submission ☐

If the user chooses to use the popup window for GL Detail Entry they have further customization available. They can customize the fields/order by changing the associated grid columns.

Invoice Details


Description *	GL Account *
Repair of truck	10-44-480 (General Repairs)
Amount *	YTD
450.00	\$0.00
Budget	Variance
\$0.00	\$0.00

SAVE SAVE AND ADD NEW CANCEL

By using the arrows that appear they can also resize the popup size to be bigger or smaller as may be desired

Grids

Throughout the entire system, grids are customizable for each user individually. Users can make the system their own by adjusting to what they find most beneficial. This is done via the column chooser in the upper right

corner of each grid  When this is selected users can add/remove columns to fit their needs

Column Chooser
×

PY1YTD
PY Variance
% Budget Variance
% Budget

In addition, filters are sticky on most grids, so they can save a filter to customize even further

Drag a column header here to group by that column

Fund ↑ 1	Segment	Account No	Title
		10-50	

Troubleshooting

I can't see my invoices, or I can't see my GL accounts.

These are the most common issues we get through support tickets, and they are some of the easiest to solve. As mentioned previously, the entire site is customizable, and filters are sticky. That means if a user leaves a filter on it will still be there when they come back.

The solution is simple, either remove the filter manually or reset the grid back to the default. Resetting the grid is done by clicking the X in the upper right corner.

Finding an invoice in workflow

Finding an invoice in workflow can be done in several different ways depending on the users' access/involvement in the invoice.

For an AP clerk the invoice dashboard page is the best place to look for an invoice. Make sure to clear any filters when looking

Invoice Dashboard									
Department ↓		Queue Name ↑		X [Download] [Export] [Print]					
Vendor	Invoice Number	Invoice D...	Input Date	Batch	Days In...	Amount			
Q	Q	Q	Q	Q	<	Q	Q	Q	Q

For an invoice you have entered/approved, the invoice status page is a great place to look. Keep in mind this page only shows things that you have been involved in, meaning you have previously approved/entered

Invoice Status									
Department ↑		X [Download] [Export] [Print]							
Queue Name ↓	Vendor	Invoice ...	Invoice ...	Days...	A	Po...	Input D...	Bat...	
Q	Q	Q	Q	Q	Q	Q	Q	Q	Q
Department: Finance									

Another great place to look is on the Vendor/Invoice Lookup page

This page has two tabs. The Caselle tab shows everything that exists in Caselle (fully approved invoices). The Workflow tab show everything still in workflow. Use the filter row to search for what you are looking for.

≡
Invoice Dashboard

Vendor Name ✕

METRO BUSINESS SUPPLIES (642)

Remit To Address ✕

METRO BUSINESS SUPPLIES (1512 L&A RD)

Invoice Number

234561

PO's

Invoice Date

12/18/2021

Payment Due Date

12/18/2021

Input Date

12/18/2021

Default GL Period

12/22 (12/31/2022)

Total Amount

80.00

Department

Finance

Step

1-Finance Entry

2-Finance Approval

User Override

Notes

5. Make the necessary changes
6. Click Save
7. Click Approve


By doing it this way the information in Caselle will match miViewPoint. You can also manually make the changes in both miViewPoint and Caselle

Adding a new GL account in Caselle

When you add a new GL account in Caselle it will not be immediately available in miViewPoint. miViewPoint will sync new GL accounts once an hour but you can manually force it to happen sooner.

To force miViewPoint to sync new accounts simply go into Administration -> Groups and select any group. Then hit Save. This will sync accounts for ALL groups.

I still can't see the new account

miViewPoint caches account lists in the browser for speedy entry. To get that cache to refresh the user can simply close the browser completely or they can click the refresh button next to Vendor Name 

I did all that, but I still can't see the new account

At this point, you need to check the Group account access. Typically groups are setup with account ranges or masks, but if individual accounts are entered, you will need to adjust to include the account you newly created in Caselle.

Find the relevant group in Administration -> Groups and go to the General Ledger tab. You can click the Selected Accounts button to see what accounts are included in the ranges you've entered. Adjust as necessary.

Expenditure Account Range

1050000-1057999

ACCOUNT LIST

CLEAR

ALL

RANGE SEPARATOR

ITEM SEPARATOR

NOT

SELECTED ACCOUNTS