microix

Workflow Modules *for MIP™ Fund Accounting Software*

Use this checklist during your evaluation of Microix Workflow Modules

General Features	
	Utilize Microsoft SQL 2012 R2 or Higher
	Seamlessly integrates with MIP™ Fund Accounting Software
	Workflow routing of documents
	User licenses are independent of MIP™ Fund Accounting
	Utilizes any SMTP/POP3 email server to send email notifications
	System Alerts
	Wizard to quickly setup and maintenance of system
	User defined fields
	Up to 5 databases per MIP Org. ID
	Windows Active Directory
	Import of CSV and Excel files
	Attach backup with PDF Viewer and Web Cam built into the attachment
	Document Manager to allow documents to be docked horizontally or vertically or un-pinned from the tabbed interface
	When using the grid column filter, you now have the option to use multi-select for specific values or continue to use text search
	Choose between different color swatches to enhance the Microix user interface
Software Requirements	
	For Microix Requisition Module • MIP™ Fund Accounting Accounts Payable Module is required • If you need to encumber purchases, then MIP Encumbrance Module is required
	For Microix Inventory Module • Microix Requisition Module is required • To process Sales Orders in Microix, AR Reporting in MIP™ is required. • You would only need MIP's AR Billing if you wanted MIP to produce and print the invoice.
	For Microix Budget Module MIP™ Fund Accounting Budget Module is **not** required **unless** you need to create additional budget versions other than the original or revised.
	For Microix Timesheet Module MIP™ FA Payroll is required.
Hardware Requirements	
	Available upon request
Licensing & Installation	
	Standard Windows installation
	Remote access and hosted options available
	Concurrent licenses
	Cloud Companion Web licenses available (limitations)
	Maintenance includes new versions and product enhancement
Optional Application/Devices based on Module	
	HTML Approval
	Vendor Punchout Catalog
	Microix Cloud Companion Web Application –*based on named users*
	External Time and Attendance Clocks *(for Microix Timesheet Module)*
	Inventory Barcode Scanner *(for Microix Inventory Module)*
	Additional databases over 5
History and Security	
	Limit entry and viewing access
	User security maintenance
	Store unlimited history
	Audit trail available *(includes Windows and Web Client login history for up to one year)*
Business Rules	
	Advance paperless Workflow Process
	Budget checking at any combination of segment
	Setup different budget checking levels for each workflow
	Available funds are displayed for each item on Requisition/Purchase Order
	Budget checking includes in-process Requisition/PO
	Prevent user from submitting a Requisition/PO if funds are not available
	Setup spending limits for vendor and employees
	Display account balance available for Managers
	Configure business rules on transaction entry
	Duplicate check warning
	Electronic document management
	Create System Alerts
	Approve from email within a phone, tablet, or PC
	Auto assign document numbers
	Change ownership of documents
Paperless Workflow Process	
	Create workflows based on groups with requesters, approvers, routing rules, account restrictions, etc.
	System driven approval process that automatically routes the requisition to the next level based on routing rules that are defined in the workflow process
	Route based on total dollars

	Routing process based on direct routing vs incremental routing
	Route based on categories or by any account segment
	Workflows/employees can be restricted to use specific accounts
	Enforces account code combinations from MIP ™ FA
	Approval substitutions
	Workflow/employees can be restricted to use specific distribution codes
Shared Activities	
	Re-route documents for correction
	Email questions before approving
	Attachments
	Audit Trail
	Sorting/Grouping/Filtering in our data grids
	Report Export
	Import from CSV, Excel
Reports	
	Design report layouts with multiple groups and filter options.
	Can be exported to Excel, CSV, and PDF
	Pie and bar charts
Requisition /Purchase Order Module	
	Detailed Requisition/PO fields including description, reason justification, special instructions, comments, dates, item numbers and more…
	Create user defined fields
	Purchase orders can be encumbered
	Purchase order can automatically create an A/P transaction in MIP
	Check request, expense reimbursement, etc. can automatically create an A/P transaction in MIP
	Download credit card transactions from bank *(Import option for OFX file if banks are unable to use our seamless credit card download)*
	Credit Card Purchase requires Pre- Approval. Credit card purchases and/or reconciliation with the credit card statement
	Create blanket purchase orders and later create a check request to draw down the funds.
	Vendor 1099 information can be assigned to each item when converting a purchase order to an A/P transaction
	Detailed Audit Trail
	Process Requisition with an unassigned vendor
	Line-item vendor selection
	Multi-line distribution codes can be used when creating a purchase request from the Shopping Cart List
	Vendor punchout capabilities
	Options related to Users/Requesters
	View all the document they have created in the system and know where they are in the approval process
	Electronic documents can be optional or required to attach and later transfer to MIP
	Auto-Attachment
	Can use a shopping cart form to allow users to pick item and automatically create a purchase request
	item description field is 255 characters
	Select items from a shopping list
	Can select Check Address to the Requisition entry form
	Can view payment information
	Quickly recall a submitted document before it is approved (limited)
	Can view the requisition as a read-only document after submitting it for approval
	Can modify encumbered purchase orders
	Send automatic notification when document is finally approved or denied
	Option to add a new vendor that will later be verify and confirmed by accounting.
	Batch scanning from scanner device
	Decentralized or Centralized Receiving functionality
	Fax/email PO capabilities
	Query vendors and chart of accounts
	Options related to Purchasing
	Split purchase orders
	Consolidate purchase orders
	Options related to Approvers
	History of Requisition/Purchase order
	Automated approval substitute
	Alternate approvers
	Email notification
	Approve via a smart phone tablet or pc
	View audit trail
	Can access a list of MIP's Selected invoices to pay. Can use this list to print copies of all attachments instead of selecting individually in Microix
	Edit/modify, Approve, re-route, void, view attachments, view available funds
	Warning feature to detect duplicate invoices based on vendor and invoice value
	Report to show approval information and duration
Inventory Module	
	Inventory control
	Multi-warehouse storage management
	Automate receiving, returns, and manual adjustments monitoring inventory levels
	Check real time item availability
	Lot, Serial, Expiration Date and Bin Tracking
	Print physical count sheets at any interval
	Print barcode label for inventory items
	Manage inventory adjustments for shortage, stolen and damage items
	Generate purchase order for items running low /PAR value and submit it through an approval process
	Track movement of inventory to identify fast or slow-moving products Analysis of seasonal demand by month or year
	Monitor inventory levels to increase visibility and control of inventory and stock levels

	Auto-Fulfill All Documents
	Barcode scanner for Physical count, Receiving and Picking
	Alerts for when items are running low
	Create Sales Orders
	Allow different cash accounts when creating a cash receipt
	Process inventory and non-inventory items
	Fix asset tracking (no depreciation)
	Inventory fixed assets
	Build kits/produce assemblies
	Purchase inventory with multiple units of measure
	Create offset for CR and CD when using inventory account
Budget Module	
	Decentralize or centralize the budgeting process
	Pre-load worksheets with current and prior year data from MIP™ General Ledger
	Create budget worksheet for any time-period based on any program, fund, grant, department, cost center or designation of your choice
	Submit to a multi-level approval process
	Transfer to MIP™ FA as un-posted budget entries
	Use Excel formulas to automatically generate next year's budget entries from current year's activities
	Re-route worksheets for modifications
	Managers can elect to or make it mandatory to enter Justifications/narratives on a worksheet by GL account
	Custom formula for budget worksheet
	Budget multi-year grants and programs in addition to annual fiscal year budget
	Consolidate all budget worksheets at any time during the budget preparation process for organization wide reporting
	Create multiple versions of the same budget
	Distributes the budget automatically using MIP's distribution codes
	Displays budget vs. actual data for current and prior years
	Estimates remainder of year based on current period
	Budget each payroll position along with their benefits
	Enter FTE % on the budget salary worksheet
	Lock specific GL accounts from being modified on a budget worksheet
Timesheet Module	
	Route timesheets through a multi-level approval process with email notification
	Automation process of syncing payroll distribution codes to timesheet allocated hours, generating a standard timesheet in MIP™ FA
	Biometric External Time clocks managed by Microix cloud website *(Cloud does not require static IP or location to location VPN to network clocks together. All clocks are pre-loaded into Microix cloud therefore clocks connect to the internet into Microix cloud server)*
	Web Time clock
	Option to require time clock notes while an employee is clocking in or out

	Scheduling application- Allows staff to do a complete employee schedule. Will be integrated with timeclocks. Can compare scheduled time to actual time.
	Enter time on a timesheet
	Requirements for California Overtime Rules
	Requirements for Federal Overtime Rules
	Requirements for Weighted average Overtime
	Requirements for Shift Differential Pay
	Requirements for Holiday Pay
	Employees
	Clock in and out via external timeclock and/or web time clock
	Timeclock users can see their preliminary or supervisor created timesheets and approve them via HTML approval.
	Clock in/out rule to not allow early punch IN or late punch OUT entries
	Web timeclock will now show current period hours by day while clocking IN/OUT
	Record hours/leave and expenses on a timesheet
	Leave request, view paystub and employee information
	Allows users to request negative leave with exceptions
	Hours can be charged to different funding sources
	Prevent users from submitting timesheets that have less than scheduled hours
	Prevent employee default charge/distribution code from being modified on timesheet
	MIP™ Payroll module earning and leave codes are available when creating a timesheet
	Timekeepers
	Process timesheets for multiple employees
	Add hours to a timesheet for accrual purposes
	Create a manual punch
	Transfer approved leave hours for salaried employees without a timesheet
	Managers/Supervisors
	Approve multiple timesheets simultaneously
	System will validate timesheet hours with time clock hours
	Access the original timesheet and make necessary changes
	View timesheet summary information for each employee
	View audit trail of changes made to the original timesheet
	Approve/deny leave request
	View leave calendar
	Alerts of employees who did not clock in the previous day
	Alerts of employees who miss clock in or out during the current period
	Alerts of employees who did not submit their timesheet within a specific number of days
	Alerts of approvers who did not approve in a timely manner