

PDS UGA 2019 CONFERENCE
The Magnificent Seven
 SESSION DESCRIPTIONS

Track	Session Name	Session Goal	Session Description
Education	HR 101: HR Structures	Set up job and position structures in Vista.	Learn how manage your job and position structures in Vista. This workshop guides you through adding additional reporting levels between existing positions, a useful skill should you need to revise or expand your company's reporting structure. You'll also learn how to add a new position to the system, including a manager assignment and position detail with a pay grade and qualifications. Finally, you'll add a new position group to help organize and manage a series of new positions.
Education	HR 102: Performance Reviews	Set up, assign, and run through a performance review.	Learn how Vista's Performance Review features help you to manage much more than annual performance reviews. This workshop will take you through the steps required to set up, assign, and perform a review.
Education	Benefits 101: Basic Benefit Plan Setup	Define benefit plans, including premiums, valuations, deductions, and fringes.	There are many nuances involved in setting up benefit plans to effectively serve your organization. Plans must be organized into plan groups, plans, and options. Premiums, valuations, leave accruals, deductions, and fringes have to be set up for proper processing and calculations. Eligibility rules must be set up to cover all possible scenarios. This workshop will present a case study involving a variety of benefits-related needs and guide you through the process of analyzing those needs, converting them to an effective setup, and testing the benefit plans in Vista.

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Education	Leave 101: Leave Processing	Walk through leave processing using Vista's flexible accrual engine.	Learn the basics of setting up a leave plan, including linking your plan to Benefits and a payroll earnings type. With the number of government-mandated leave plans being implemented nationwide, learn how Vista's flexible leave accrual engine can cover many different configurations. Let the trickiest thing about Vista Leave Accrual be deciding which days to take PTO!
Education	Crystal 101: Crystal Report Basics	Create basic Crystal Reports.	With little or no previous Crystal Reports® knowledge, learn the process of creating basic Crystal Report templates using the Vista database. This workshop will teach you the fundamentals of report design. You will learn how to do the following: create a report using a single Vista view, add objects to your report, format reports, sort records, use the Select Expert feature, create summary records, and more.
Education	Crystal 104: Integration into Vista	Integrate your Crystal Reports seamlessly into Vista.	Take Crystal reporting in Vista to the next level in this workshop. Learn how to add reports to Vista and schedule them to run interactively or on a regular basis. This workshop also details how to customize Crystal reports by adding parameters, including field definitions, and the integration of PDS Enterprise Server resolvable keywords into Crystal reports. Finally, it reviews how to create links throughout Vista to open specific Crystal reports.

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Education	Analytics 101: Introduction to Analytics	Create your own Vista Analytics and add them to your dashboards.	Experience this powerful Vista add-on component in this example-driven workshop. Learn how to create your own analytic, use both grid and graph views, and add user-defined parameters. Then learn to create more advanced analytics that offer drill-downs to navigate across Vista, and finally learn to add your analytics to a Vista dashboard. (If you don't currently own the Vista Analytics component, you will receive complimentary access at the UGA, so this is the perfect time to evaluate it for your organization.)
Education	Security 101: Know your Rights	Navigate through Vista Security, including applications, pages, and options.	Navigate through the Vista Security application and learn about the different types of security access. Using what you've learned, create a new Security Group, move a current user to the new group, and grant them access to the appropriate applications, pages, and options. Also learn how to create security overrides for specific members of the group. Finally test your accomplishments by viewing Vista as two different users.
Education	Recruiting 101: Basic Setup and Qualifying Questions	Create a recruiting requisition, post your job details, and add qualifying criteria.	Walk through the process of building a new requisition in Vista while understanding the seamless integration of HR Positions and Jobs with the Recruiting component. Learn how to alter posting details, edit job descriptions, and define qualifying criteria to fill a role, including the new rating/scoring feature!

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Education	SQL 101: Simple Queries	Open up the endless Vista data possibilities with basic SQL queries.	Have you ever wondered how your technical staff can type in a few commands to magically accomplish a task that would have taken you hours and hours? Attend this workshop to understand the basics of SQL, which will help you to communicate more effectively with the technical team, and to work more efficiently!
Education	Workflow 101: Workflow Basics	Plan and define a basic Vista workflow, attach security, and launch it.	Explore Vista's workflow functionality in this introductory workshop. You'll learn how to launch a workflow from Vista's self-service module and learn the mechanics behind it, including Vista security setup. You'll also walk through the process of planning and creating your own Vista workflow template using a flowchart.
Education	Payroll 101: Setup	Prepare Vista for payroll processing by setting up earnings, deductions, and more.	Learn the power of Vista setup tables pertaining to payroll. This workshop will introduce you to various payroll tables such as Earnings, Deductions, Tax Profiles, Fringes, Direct Deposit, Shift Codes and Charge Numbers. We will first review these tables, and understand how to set up a new entry for each of these. Next, you'll see how to assign employees to specific setup values prior to processing a payroll.

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Exchange	Personalizing Vista	Make Vista yours by following these tips to personalize the “look and feel”.	The Vista 7 Release introduced a new UI and in this session, we will review the options and tools you'll need to personalize the "look and feel" of Vista 7 and make it your own. In this semi-technical session, you will learn how to change themes, personalize the experience for self-service users and use configuration tools to style your system content. This is a must-see session for all customers, whether you are still upgrading to 7.0 or have already upgraded.
Exchange	Your New Career Center	Automate your recruiting process with Vista and improve your recruiting metrics.	Is your HR and Recruiting team still requesting candidate resumes and applications through standard email when looking to fill a role within your organization? Then attend this session to learn how the Vista 7 Career Center can automate your recruiting process. We'll review many of the recommended practices and steps to help build your personalized Vista 7 Career Center to best attract the top applicants for your organization.
Exchange	The New Payroll Experience	Reduce your Vista payroll processing time by 50% or more? Yes!	You've heard about the new, Vista 7 Payroll, and have been anxiously looking for more details on what features have been included. Attend this session to learn about this new version and how it will likely reduce your payroll process time by 50% or more, while improving dozens of payroll configuration and processing capabilities.

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Exchange	The New Payroll Experience II	Find out the best tips and tricks to upgrade to and use the new Vista payroll.	In the prior session, you learned about some of the new features of Vista 7 Payroll. Now listen as existing users, along with PDS experts, share their experience upgrading to and using the new version. This includes general procedures, tips and tricks, and how to facilitate a smooth upgrade process.
Exchange	Document Management	Integrate fill-in PDF documents into Vista, along with electronic signatures and virus-checks.	Do you have PDF fill-in forms that you want to integrate into Vista? Do you have a need for electronic signatures on forms? Are you concerned with employees or job applicants uploading documents with embedded viruses or harmful macros? Then it's time to focus on the powerful Document Management tools available in Vista 7! We'll use different government forms, Crystal reports, and other documents to demonstrate both the capabilities of and differences between Adobe Form and Adobe Sign. We'll also cover the registration and initial setup process for Adobe Sign. Then we'll touch briefly on the new virus and macro scanning capabilities introduced in Vista 7, as well as other already existing document management features.
Exchange	Leave Accrual	Set up leave processing, FMLA, and sick leave policies to comply with multiple laws.	Here we'll start by reviewing the Leave accrual setup and processing of different leave types. Then we'll focus on how Vista can track FMLA using the base system setup as well as the different ways to set up various sick leave policies that states have now required employers to follow. Finally, we'll cover some lessons learned when it comes time to rollover vacation or implementing new plans.

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Exchange	Fine-Tuning Benefits	Integrate benefit teams, linked plans, coverage associations, and more into your benefits processing.	There are many features within Vista that can enhance your Benefits experience. In this session we will explore some of the newer, yet underutilized, benefits features. These include: benefit teams in eligibility, dependent or linking plans, coverage associations and user-selectable valuations. We'll revisit date fields and their effects on payroll and reporting with Vista, including 834 interfaces. Finally, we will review some options to decrease your benefits processing times.
Exchange	Streamlining the New-Hire Experience	Too much involved with new-hires? Automate, automate, and automate with Vista!	This session is tailored for those who are familiar with Vista's new-hire procedure and are looking to automate additional items during the process. Have you ever wanted to send an automated e-mail to your new employee once on-boarded? Would you like to generate analytics for long-vacated positions? Between customer examples and PDS best practices, we'll make your new-hire process a breeze!
Exchange	Benefits Enrollment (Current and Open)	Open up the Vista enrollment wizard to your employees and tailor it to your specifications.	Join us to learn the magnificent secrets of Vista benefits enrollment! If you require staff to positively enroll in their benefit selections each year, then you must automate the process by deploying the Vista open enrollment wizard tool! Are you ready to improve the new hire experience by letting staff walk through their own benefits selections? See examples of both current and open enrollment and learn how to configure and maintain the processes to make your enrollment process magnificent!

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Exchange	Unleashing Vista Analytics	Empower EVERYBODY with Vista Analytics and reap the ROI!	Put your seatbelts on because in this session we're going to take a ride together using the most powerful tool currently available in Vista 7 – the Analytics component! Learn how to incorporate some of most effective analytics to maximize Vista's unearthed potential, and present results in an engaging graph display, or in grid format with drill down capability. Learn how to use your own user-defined parameters and build custom dashboards for key stakeholders within your organization. Listen to how existing Analytics users are getting positive ROI right now for Vista Analytics, including improved daily functions and processes.
Exchange	Reporting	Be a company hero by learning Vista reporting secrets.	The true power of any HCM comes from the ability to extract, report on, and analyze the wealth of information locked within its database. Come to this session where we will explore and compare the reporting tools available within Vista, including Crystal Reports, Analytics, Workflows, External Interfaces, EasyAsk, Issue Detective, System Administration, and version 7.0 features such as the Export link and the Info button. We will demonstrate multiple ways to schedule and deliver reports including linking to My Pages or adding a Favorite in 7.0. We will do this by presenting real-world client solutions and various tips and tricks, including incorporating Commands, "unqualified data sources", and PDS Field Definition Keywords into Crystal Reports.

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Exchange	Employee Development	Use Vista succession planning tools to evaluate your organization's current talent and identify potential future leaders.	Join us as we focus on the Employee development process and how to use Vista to track this information. Raissa Wetcher from Roberts Oxygen will talk about how she uses Vista and the 9-Box process, which helps plot employee performance against potential. We will also review other ways that clients have reaped the rewards of automating performance reviews by leveraging Vista.
Technical	Development in Vista HRMS - Part I	Learn the Vista development model to expand Vista however you need.	Understanding the Vista 7 coding model is essential to designing and developing your own specialized content in your on-premise Vista environment. This three-part session is a must for anyone who wants to code using the Vista development model. All three sessions will focus on the programmatic content of an existing Vista applet, and enhancing it with new release features. Part I will focus on web design overview, data model development, code generation, and technical documentation. If you would like to have a good general understanding of how development is done in the Vista product, don't miss this session.
Technical	Development in Vista HRMS - Part II	Walk through details of coding Vista web pages and web parts.	Continued from Part I, Part II will cover more detailed aspects of web page coding. This will begin with the web page coding structure, and include an overview of the Vista server-based libraries to help understand most web controls. Also covered here will be the utilization of web parts and how they are integral to driving the application's information at-a-glance pages.

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The Magnificent Seven
 SESSION DESCRIPTIONS

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Technical	Development in Vista HRMS - Part III	Tie together Vista development concepts with a case study.	In Part III, we will continue to drill into the coding components of Vista, drawing from the information presented in the first two sessions. We will focus specifically on customizing Vista to meet specific needs that you may have that do not come “out-of-the-box”. We will draw on specific examples that we have seen from our customer base, as well as throwing out new ideas that you may want to consider as you evaluate you requirements vs. our base system offerings.
Technical	External Interfaces	Learn Vista External Interfaces and compare it to other Vista methodologies.	In this example-based session we'll delve into the External Interfaces tool, a module that builds upon the PDS Enterprise Server technology. We'll look at import, export and the multitude of options with External interfaces, and help you select a solution that will fit your requirements. We'll contrast this with an interface that only uses Enterprise Server, so you can choose your preferred tool. Additionally we'll explore methodologies for exporting data directly to Excel.
Technical	Payroll Processing Technically Speaking	Open up the new Vista 7 Payroll and explore its intricacies.	You've learned about the large number of payroll improvements in the new Payroll release from prior sessions. Now review them from the technical perspective. Learn about the many technical tools that have been folded into Vista Payroll to help your organization configure and manage the payroll experience.

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 SESSION DESCRIPTIONS

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Technical	Recruiting Under the Covers	Dig into the underpinnings of the Vista Recruiting module.	Understanding the many changes to Vista 7 Recruiting from a technical perspective is key to adapting your own internal applicant processes as part of your Vista 7 experience. In this session we will focus on the changes that we've made to improve the applicant and recruiter experience, and simplify getting jobs filled quickly.
Technical	Workflow in Action	Follow examples to build workflows from start-to-finish.	In this session we will take a Session Conference Workflow and demonstrate how to build it from start to finish. We will show you how to design the Workflow, the steps needed to enter a Workflow into the system, and how to test and monitor it. We will also review the Workflow tools and what they are used for, as well as provide additional Workflow examples.
Technical	Analytics Technically Speaking	You can't unleash the power of Vista Analytics unless you understand how they work.	Throughout the conference, appropriate Analytics are being introduced in the different sessions. Those references are all from a user's perspective, but in this session, we'll learn how to construct your own Analytics using the existing PDS library of 100+ Analytics as a base – or from scratch. You'll learn general design considerations as well as tips and tricks to make your Analytics deliver the value that your stakeholders demand, plus more that they hadn't yet considered.
Technical	Enterprise Server Solutions	Find out the innovative and valuable Enterprise Server jobs your peers are using.	As the back-end "e-Assistant" of all Vista job, report, and workflow processing, Enterprise Server is a critical component of your Vista installation. In this session, though, we'll draw from new and innovative ways that your peer organizations are leveraging Enterprise Server. We'll start with examples and then show you technically how to do the same in your organization.

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 SESSION DESCRIPTIONS

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Technical	Security	Open up and lock down Vista to whom you want and how you want.	With the release of Vista 7 we provided many new Security options/configurations to enhance the user experience. In this session we will be reviewing our enhancement to Company, Organization, Location and Team settings to increase employee engagement throughout the system. In addition, we will review our aPersona, SAML, and LDAP configurations as employee authentication options. As we do this, we'll show you how our customers are already taking advantage of these features.
Technical	Upgrade Insights	Vista 7 is a big step above Vista 4.1 – Learn what you need to do as you upgrade and afterwards.	Have you upgraded to Vista 7 or are you relatively new to Vista 7? Vista 7 folds in a variety of big improvements that can make your life a lot easier: fresh, intuitive user interface with improved navigation that will minimize training needs, and many new features such as one-click exports, Learning Plans, increased employee engagement options, and more. In this session offers upgrade insights, highlighting the changes you need to watch for and how to manage any custom changes. We will also look at some of the new Vista 7 features, including how to activate the new Vista 7 payroll.
Technical	Open to the Public - Public Web Pages and Vista	Learn how to integrate public web pages within Vista.	In this session we'll explore making public available pages, from a subscribable internet calendar, to login page extensions. We'll address which master pages make the most sense, how the web.config is impacted, and tips on "semi"-public.

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 SESSION DESCRIPTIONS

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Demonstration	Vista Overview	New to Vista? Start here!	The Vista Overview will be a high-level overview of Vista in its entirety. We will provide a demonstration using various types of users: employee, manager, recruiter, payroll, HRIS analyst while demonstrating the complete Vista solution. Whether you are new to Vista or would like a refresher on all the features of Vista, this is a great starting point for you.
Demonstration	Vista Reporting	What's the best way to report on Vista information? We'll show you.	Vista Reporting will provide an overview of the extensive reporting tools available. This demonstration will include Crystal Reports, EasyAsk, Analytics & Dashboards, Export, and SSRS Reporting capabilities. We will also review organizational tools, electronic document management, compliance reporting and historical tracking.
Demonstration	Vista Learning Management	Help your employees grow necessary skills with Vista Learning Plans.	This demonstration will provide an in-depth look at Vista's Learning Management. We will demonstrate examples of creating employee learning plans, enhancements to qualifications, new reports and analytics. We will show examples of using the Courses feature in Vista, showing the ability to track an employee's progress for a specific goal and prepare them for new roles. We'll also demonstrate how to easily create Learning Plan Templates by configuring qualifications on Companies, Locations, Organizations and Teams.

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Demonstration	Vista Recruiting and Onboarding	Your new employees' introduction to your company starts here, so learn how to make it right.	In this demonstration, we will dive into Vista's Recruiting and Onboarding capabilities. We will provide examples from an applicant's perspective, a recruiter's perspective, and hiring manager's perspective. We will also demonstrate Onboarding examples that are currently available in Vista as well as a brief overview of Vista's Enhanced Onboarding.
Demonstration	Benefits Processing & Open Enrollment	Use Vista to help your employees review and select their benefit plans during enrollment time.	This will be an in-depth demonstration on setting up benefit plans for current and open enrollment, including benefit plans, eligibility, premiums, and valuations. We will also demonstrate open enrollment options and provide a demonstration of an employee utilizing Open Enrollment through Self Service.
Demonstration	Time and Attendance – Core + Vista Time	What are your time and attendance needs? Vista has different solutions for different needs.	In this demonstration, we will walk through Time and Attendance in our Core Vista System and Vista Time modules. When it comes time to providing the time and attendance tool that meets the needs of your workforce, PDS is flexible. Both Vista and our enhanced, cloud-based time and attendance tool (Vista Time) offer many features that give your organization options to manage your workforce more effectively. We will cover time entry, project/task tracking, labor levels, integration with payroll, and reporting.

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The Magnificent Seven
 SESSION DESCRIPTIONS

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Demonstration	Employee & Manager Self-Service	Empower managers and employees while reducing your administrative workload!	Here we will provide examples of how you can use Vista to empower your staff whether your workforce uses a computer, smartphone or tablet; or has remote access to your secured site from home. From an employee's perspective, we'll demonstrate common changes such as changing their address, requesting time off, and changing their W-4 - you decide what to make available. From a manager's perspective we'll cover approving time off, completing a performance review, and managing employee information. In addition, we'll demonstrate how you can configure Vista in areas like My Pages, My Groups, Page Options and My Favorite Reports to make the user experience effective and efficient.
Demonstration	Vista Performance Management	Goals, Reviews, Career Planning, Oh My!	In the Performance Management demonstration we will highlight features such as Goal Management, Performance Reviews, and Career Planning in Vista. Regardless of how manual or automated your current performance process is today, you owe it to yourself to learn about how Vista can help make your team more efficient! We'll also demonstrate how Analytics can help visualize your performance results and make them useful to the management.
Demonstration	Vista's New Payroll Processing	Let Vista handle all of your payroll needs.	In this session, we will show you the new features in Vista's recent Payroll release such as Batch Headers, the changes in validation/update phase, and many new options to streamline your payroll process. We will demonstrate the complete payroll process including running a payroll and producing reports and analytics.

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The Magnificent Seven
 SESSION DESCRIPTIONS

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Demonstration	Vista Time	Learn how Vista Time can handle intricacies of scheduling, shifts, kiosks, black-out dates, and more.	In this demonstration we will provide a high level overview of Vista Time and then focus on enhanced Vista Time features such as Advanced Scheduling, Shift Swapping and Notifications, Kiosk Native App, Black-Out Dates, and more.
Demonstration	Employee Engagement	Engage! Engage! Engage!	In the Employee Engagement demonstration we will provide examples of how to engage your workforce. In Vista, we will demonstrate the use of Calendars, News, Surveys and My Groups to effectively communicate, engage and empower your employees.
Demonstration	Technical Tools	Peak at the technical tools that support the Vista user experience.	In this demonstration, we will provide a high-level review of the various technical tools available in Vista. We will demonstrate examples of Adobe Sign, Adobe Form, Photo Editor, Issue Detective, Workflow, Translation, External Interface, and many more tools that can create efficiencies in your organization.
General	Opening Session and Vista Roadmap	Get the most out of your conference attendance!	The opening session introduces attendees to the conference content and flow and provides the opportunity to start networking with your peers! You'll hear an update on what's happening at PDS. We'll also feature the PDS product roadmap so that you can plan your magnificent future!
General	Payroll RoundTable	Bring your payroll questions and perspectives, and share them with your peers and PDS experts.	There will be two separate Roundtable discussions focusing exclusively on payroll considerations.

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The Magnificent Seven
 SESSION DESCRIPTIONS

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General	Benefits Roundtable	Bring your benefits questions and perspectives, and share them with your peers and PDS experts.	There will be two separate Roundtable discussions focusing exclusively on benefits considerations.
General	HR Roundtable	Bring your HR questions and perspectives, and share them with your peers and PDS experts.	There will be two separate Roundtable discussions focusing exclusively on HR considerations.
General	Technical Roundtable	Bring your technical questions and perspectives, and share them with your peers and PDS experts.	There will be two separate Roundtable discussions focusing exclusively on technical considerations.
General	Brainstorming I and II	This is your time! Bring your wish lists so we can add them to our development schedule.	This conference component of the UGA is a major highlight for customers. This is where you bring your product enhancement requests so that we can discuss them together and vote on the ones that will become priorities for the PDS Development team. Don't miss out!