Conference Agenda

PDS UGA 2017 · INDIAN WELLS, CALIFORNIA

Vista
An Oasis of Possibilities

Date/Time		Track	Session	Description
Tuesday, September 12th				
1:00 PM	3:00 PM		Conference Registration	Register for the UGA conference event, and connect with PDS staff, UGA Steering Committee members, and your peers. Map out your schedule so that you make the most of "Vista – An Oasis of Possibilities".
3:00 PM	5:00 PM	General	Opening Session and Product Roadmap	The opening session will introduce you to the many PDS participants and the UGA Steering Committee who have planned this year's conference event. You'll hear an update on what's happening at PDS. We'll feature the PDS product roadmap and a demonstration of upcoming new features. **Make sure to plan your travel accordingly so you don't miss this important conference event.**
6:00 PM	9:00 PM		Welcome Reception	Join us for the Welcome Reception where you'll connect with PDS staff and customers you may have met in the past. Make the most out of your conference by leveraging your networking time.
Wednesday, September 13th				
7:00 AM	8:00 AM		Breakfast	A full breakfast is offered each morning, so bring your appetite and start your day off right!
7:30 AM	5:00 PM		Conference Registration Desk	The registration desk will be available throughout the conference so that you can ask questions about the conference, check for messages, or leave a message for another attendee.
8:00 AM	10:00 AM	General	Brainstorming Session	Meet with your peers to brainstorm on product ideas and solutions. Come prepared with your own list of features. Take this opportunity to prioritize the product features that are important to you and your organization.
10:00 AM	10:15 AM		Break	
10:15 AM	5:00 PM		Vista Solutions Center	Throughout the conference, the Vista Solutions Center will be available to customers who want to chat with product experts. Take this opportunity to explore the latest Vista product hands-on. Sign up at the registration desk for your time slot.

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Date/Time		Track	Session	Description
10:15 AM	11:15 PM	Education	HR 101: HR Structures	In this workshop you will step through the various setup components for implementing Vista. You may even be thinking of reengineering your current organizational structure and need a reminder of the process and best practices. Content will focus on Organization, Position Groups, Positions and Jobs.
10:15 AM	11:15 PM	Exchange	Personalizing Vista	The Vista Spring Release introduced a new design and changed the tools you'll need to learn to personalize the "look and feel" of Vista and make it your own. In this semi-technical session, you will learn how to change themes and use configuration tools to style your system content. This is a must see session for all customers.
10:15 AM	11:15 PM	Technical	Development in Vista - Part I	Understanding the new Vista 7 coding model is essential to designing and developing content in your own environment. This three-part session is a must, particularly with the integration of new functionality that will change the tools you will use in the future. All three sessions will focus on the programmatic content of the existing Vista application, and enhancing it with new release features. Part I will focus on product architecture, programming environments and development platforms, database concepts, and the general web programming model. If you would like to have a good general understanding of how development is done in the Vista product, don't miss this session.
10:15 AM	11:15 PM	Demonstration	Vista Overview	The general overview will provide a high level demonstration of all Vista solutions. This session is helpful for new customers, employees new to Vista or those who want an overall view of Vista's capabilities. Whether you already have Vista installed, are currently implementing or have used Vista for years, you may learn of functionality that you were not even aware of exists.
11:15 AM	11:30 AM		Break	

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Date/Time		Track	Session	Description
11:30 AM	12:30 PM	Education	HR 102: Performance Reviews	Are you looking to optimize your use of the Vista product by examining features that you hadn't yet implemented. Learn how Vista Performance Review features helps you to manage much more than annual performance reviews. We'll take this opportunity to review new functionality that has just been released and may provide you with the tools you need to streamline your review process.
11:30 AM	12:30 PM	Exchange	Implementing Your New Career Center	If your HR team is still asking applicants to mail or email their resumes in when considering a job with your organization, you'll want to attend this session to learn how Vista can automate your recruiting process. This session will review many of the best practices and steps necessary to leverage this powerful e-recruiting tool.
11:30 AM	12:30 PM	Technical	Development in Vista - Part II	Continued from Part I, Part II will cover specifics of web page coding. This will begin with web page coding basics, and include an in-depth investigation into the features found in primary Vista web pages. We will discuss topics such as web pages and web table lists, information controls and information sections, Also covered here will be the integration of web parts and how they are critical to the Vista page lifecycle. If you are a web programmer you will not want to miss this one!

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Date/Time		Track	Session	Description
11:30 AM	12:30 PM	Demonstration	How Healthy is Your Vista?	In today's competitive market, companies are challenged with doing more with less. In this session, Davanti experts will share an assessment process that ensure customers are getting the most value from their technology investment. We help teams gain consensus on how their Vista system is being utilized today, uncover new ways to configure their system to drive efficiencies and effectiveness, and share best practice solution options to ensure companies achieve short and long term goals. You'll hear from customers who've benefited from the process by simplifying their technology footprint, dramatically improving analytics, and positioning technology as a key enabler to support their business strategy.
12:30 PM	2:00 PM		Lunch	
2:00 PM	3:00 PM	Education	Benefits 101: Basic Benefit Plan Setup	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. And 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.
2:00 PM	3:00 PM	Exchange	The New Payroll Experience	You've heard about the Payroll Redesign project and have been anxiously awaiting more details on what features will be included. Attend this session to learn about the new version and how it will reduce your payroll process time by up to 50% while streamlining payroll configuration and enhancing processing capabilities.

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Date/Time		Track	Session	Description
2:00 PM	3:00 PM	Technical	Development in Vista - Part III	In Part III, we will continue to drill into the editing components of Vista, drawing from the information presented in the first two sessions. This session will focus on popup dialog windows and the .NET controls that they contain. Audience members will learn how to trigger popup windows into action, initialize and capture server control values, update the database with stored procedure calls, and some JavaScript coding techniques. Complete your "big picture" understanding of Vista 7 development techniques, plan to participate in this session.
2:00 PM	3:00 PM	Demonstration	Vista Recruiting	See how Vista Recruiting can automate your organizational needs in recruiting talent for your organization. This session will provide a demonstration on features available to the recruiting team to define and post job openings along with criteria that will help you narrow down qualified applicants, monitor and communicate with applicants, schedule interviews, and share qualified applicants with hiring managers. We'll review the functionality delivered to allow you to personalize your career site to attract talent. We'll also cover the applicant's view of the career site, both from a computer or smartphone.
3:00 PM	3:15 PM		Break	
3:15 PM	4:15 PM	Education	ACA 101: Setup	This workshop will walk you through ACA set up including company information, HR status, earnings codes and benefits. You will hire a full-time employee and a variable employee in order to review their different ACA information. You will run a benefit processing to show how the set up affects benefits eligibility.

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3:15 PM	4:15 PM	Exchange	Year-end Processing	Year-end will never be the same, thanks to the upcoming Vista Payroll improvements. With the elimination of the need to maintain a separate YE database your year-end will likely be much easier to manage. In this sesion, we'll start with our old year-end checklist and discuss how it will be impacted by the new version.
3:15 PM	4:15 PM	Technical	External Interfaces	In this session we explore and detail the capabilities of Vista External Interfaces, a tool built on PDS Enterprise Server technology. We'll look at the different types of interfaces, file types and learn more about the flexibility of this powerful toolset. We'll present a variety of sample interfaces that PDS customers have deployed.
3:15 PM	4:15 PM	Demonstration	Vista Analytics/Vista EasyAsk	Learn how Vista EasyAsk can answer your questions easily and present you with data you need. Perhaps you'd rather deliver data to your users using dashboards using Vista Analytics. The possiblities are endless!
4:15 PM	4:30 PM		Break	
4:30 PM	5:00 PM	General	Payroll Roundtable	This roundtable discussion will allow attendees an opportunity to talk amongst your peers. Representatives from PDS will be on hand to get the conversation started.
4:30 PM	5:00 PM	General	HR Roundtable	This roundtable discussion will allow attendees an opportunity to talk amongst your peers. Representatives from PDS will be on hand to get the conversation started.
4:30 PM	5:00 PM	General	Technical Roundtable	This roundtable discussion will allow attendees an opportunity to talk amongst your peers. Representatives from PDS will be on hand to get the conversation started.
4:30 PM	5:00 PM	General	Benefits Roundtable	This roundtable discussion will allow attendees an opportunity to talk amongst your peers. Representatives from PDS will be on hand to get the conversation started.
6:30 PM	9:30 PM		Banquet	Join us while we relax after our first busy day of sessions. A full dinner will be served and entertainment will be provided.

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Thursday, September 14th				
7:00 AM	8:00 AM		Breakfast	A full breakfast is offered each morning, so bring your appetite and start your day off right!
8:00 AM	4:15 PM		Vista Solutions Center	Throughout the conference, the Vista Solutions Center will be available to customers who want to chat with product experts. Take this opportunity to explore the latest Vista product hands-on. Sign up at the registration desk for your time slot.
8:00 AM	9:00 AM	Education	Crystal 101: Crystal Report Basics	This workshop is for people with little or no Crystal Reports® knowledge. As a beginner of Crystal Reports you will walk through the process of creating basic Crystal Report templates using the Vista database. This workshop is designed to teach you the basic 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, report formatting, sort records, use the Select Expert feature, create summary records, and more.
8:00 AM	9:00 AM	Exchange	Document Management	Vista provides a framework to gather your documents and secure them using Vista Security. Learn how to leverage this powerful tool. Explore document management features in Vista including manipulating PDFs with Adobe Sign and Form, and using e-signatures.
8:00 AM	9:00 AM	Technical	Payroll Engine Technically Speaking	You've learned about the large number of payroll improvements planned for the new Payroll release in prior sessions, but this time we will explore the technical perspective. Learn about the many new tools and features that have been folded into Vista Payroll to help your organization configure and manage the payroll experience.

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Date/Time		Track	Session	Description
8:00 AM	9:00 AM	Demonstration	Benefits Processing	This session will explore best practices in setup and function. The focus will be on setup and an ongoing benefits maintenance schedule, including what to do each payroll, monthly and annually to simplify your overall benefit management. Reporting tools will be explored.
9:00 AM	9:15 AM		Break	
9:15 AM	10:15 AM	Education	Crystal 104: Integration into Vista	This workshop is for people who already have a basic knowledge of Crystal Reports®, minimal familiarity with SQL, and minimal knowledge of Vista security. You will explore the different options available for integrating an existing Crystal Reports template into the Vista system. You'll explore and understand the security considerations of adding a report to the Vista menu, which you will then do. You'll learn to make report parameter prompts more friendly by defaulting and hiding values for some prompts and providing list boxes for others. Next, you will attach a Crystal Report to a button that can be placed on any webpage in your Vista system. Finally, you'll schedule the report to run as a repetitive Enterprise Server job.
9:15 AM	10:15 AM	Exchange	Communicating With Your Workforce Using Vista	Have you recognized the opportunities that Vista provides to engage your workforce? Don't miss this chance to learn how representatives from **Nelnet** will share creative ways that they've leveraged the system to interact with their staff. Take away ideas that you may want to implement back home!
9:15 AM	10:15 AM	Technical	Recruiting Under the Covers	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 upgrade. This session will focus on the changes that we've made to improve the applicant and recruiter experience, and simplify getting jobs filled quickly.

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Date/Time		Track	Session	Description
9:15 AM	10:15 AM	Demonstration	Open Enrollment	Have you deployed the Benefits Enrollment wizard? If not, you'll want to learn about Vista configuration options, so you can build your own self-service tool to simplify your team's experience. We'll introduce you to tools that will help in your current and open enrollment processing and reporting.
10:15 AM	10:30 AM		Break	
10:30 AM	11:30 AM	Education	Analytics 101: Introduction to Analytics	The PDS UGA conference workshop environment will provide complimentary access to the Vista Analytics add-on component allowing you to experience this powerful tool in this example-driven workshop. You'll 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.
10:30 AM	11:30 AM	Exchange	Benefits Day to Day	This session will explore best practices in setup and function. The focus will be on setup and an ongoing benefits maintenance schedule, including what to do each payroll, monthly and annually to simplify your overall benefit management experience.
10:30 AM	11:30 AM	Technical	Automate with Workflow	The theme of this session will be "Creating the User Experience". We will walk you through techniques, tips, and tricks to tailor who gets to see what workflow screens, when and under what conditions they get to see them, and what they get to see and use on those screens. We'll show various options available to fine-tune the look-and-feel of workflow task screens, globally and on a user-by-user basis. Finally, we'll present some techniques for attaching and/or emailing reports within the workflow.

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Date/Time		Track	Session	Description
10:30 AM	11:30 AM	Demonstration	Performance Management	Take the pain out of performance reviews! This demonstration will cover Vista's new performance management feature, which offers options for employee self reviews, manager and peer reviews as well as goals, performance reviews, and reporting. We will also demonstrate succession management and learning enhancements.
11:30 AM	1:00 PM		Lunch	
1:00 PM	2:00 PM	Education	Security 101: Know your Rights	An essential part of Vista is managing the users level of access to data and applications. This workshop will assist with navigating our security application and help outfit system users with the appropriate security access. Users can be restricted to see only people in their own workgroup or company, or security can be configured on a person-by-person basis. The visibility of menu options and individual data fields can be customized for different groups. Additionally, even when people have access to system options, you can specify whether that access is full, read-only, or workflow/approval. This workshop will walk you through the process of defining a variety of specific security requirements for a fictitious organization using Vista.
1:00 PM	2:00 PM	Exchange	ACA Experience	In this session we will provide a review of the PDS customer ACA experience and focus on common issues that we've identified, and review best practices that you'll want to put into place to insure your own success. We will also hear suggestions from customers who have learned how to manage this complex requirement.

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1:00 PM	2:00 PM	Technical	Analytics Technically Speaking	Dive into the technical underside of Vista Analytics to get the most out of this powerful tool. In this session we'll cover a number of technical topics including the following. Transform simple SQL queries into more complex ones. Construct multi-level drill-down analytics. Use built-in functions to output basic descriptive statistics. Incorporate user-defined input parameters for more flexibility. Tailor common analytics so that they display different results depending on who is viewing them. Build and deploy dashboards of multiple analytics. And convert an analytic's results into an ongoing KPI that in turn can be viewed in another analytic.
1:00 PM	2:00 PM	Demonstration	Payroll Processing	In this demonstration, we will start by taking a high-level look at payroll setup, time collection, and Vista payroll processing flow. Then, you'll find out more about the upcoming payroll release and learn how it will help you simplify your payroll processing experience.
2:00 PM	2:15 PM		Break	
2:15 PM	3:15 PM	Education	Recruiting 101: Basic Setup and Qualifying Criteria	In this instructor led workshop you will experience the seamless integration of Vista Human Resources and Recruiting. You will learn how to define the qualifying criteria to fill a position, including the new rating feature; change a few external settings that impact the external applicant site and then witness the results of your changes.
2:15 PM	3:15 PM	Exchange	Open Enrollment	If you are planning to utilize the Vista Benefits Open Enrollment wizard for your next Open Enrollment process, you won't want to miss this session. We'll briefly review Vista setup and processing, as well as the configuration of your self-service wizard. You'll also learn useful tips through a variety of real-life customer examples. Make your implementation of Vista's Open Enrollment Wizard a breeze!

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Date/Time		Track	Session	Description
2:15 PM	3:15 PM	Technical	Optimizing HRMS at AECI	If one Vista client has recognized the many "Opportunities in Vista", it would be **AECI**. Listen as Derek shares some of the complex challenges that his organization presented, and hear about solutions that he and his team have designed and implemented. Expect to get "under the covers" as Derek shares AECI's wizardly solutions!
2:15 PM	3:15 PM	Demonstration	Vista Onboarding	The Vista Onboarding session will demonstrate the onboarding capabilities within Vista and demonstrate our integration to EMPTrust, PDS' onboarding partner. We will provide an overview of the EMPTrust solution which includes not only onboarding but off-boarding, E-Verify, I-9 solutions and background checking services.
3:15 PM	3:30 PM		Break	
3:30 PM	4:00 PM	General	Payroll Roundtable	This roundtable discussion will allow attendees an opportunity to talk amongst your peers. Representatives from PDS will be on hand to get the conversation started.
3:30 PM	4:00 PM	General	HR Roundtable	This roundtable discussion will allow attendees an opportunity to talk amongst your peers. Representatives from PDS will be on hand to get the conversation started.
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3:30 PM	4:00 PM	General	Benefits Roundtable	This roundtable discussion will allow attendees an opportunity to talk amongst your peers. Representatives from PDS will be on hand to get the conversation started.
4:00 PM	4:15 PM		Break	
4:15 PM	5:00 PM	General	Brainstorming Session	Regroup with your team to determine whether your votes need to be recast based upon what you learned this week! Collaborate on things you've learned and any open items that need attention prior to the close of the conference.

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5:15 PM	6:30 PM	Optional participation	Meet the Steering Committee	If you are interested in becoming part of the PDS UGA Steering Committee, submit a nomination form and plan to attend this session to meet with the Steering Committee.
Friday, September 15th				
7:00 AM	8:00 AM		Breakfast	A full breakfast is offered each morning, so bring your appetite and start your day off right!
7:00 AM	3:00 PM		Conference Registration Desk	The registration desk will be available throughout the conference so that you can ask questions about the conference, check for messages, or leave a message for another attendee.
8:00 AM	2:00 PM		Vista Solutions Center	Throughout the conference, the Vista Solutions Center will be available to customers who want to chat with product experts. Take this opportunity to explore the latest Vista product hands-on. Sign up at the registration desk for your time slot.
8:00 AM	9:00 AM	Education	Workshop Self-Study	In this time slot we'll let the audience choose which workshops to participate in.
8:00 AM	9:00 AM	Exchange	Vista Analytics	Learn the power of Vista Analytics in this example-driven session. With this optional add-on Vista tool, you can provide a visual window into your employee data! Learn how to leverage this awesome tool to replace reports with the data you need, and use drill-downs to get to where you want to go in Vista.
8:00 AM	9:00 AM	Technical	Vista EasyAsk Administration	In this session we will review some of the new administration tasks related to the new Vista EasyAsk interface and take a look into the Data Dictionary Workshop for maintaining and tuning your dictionaries to meet your users questions using synonyms and brining your own data to the mix.

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8:00 AM	9:00 AM	Demonstration	Vista Time	This session will give an overview of our Time and Attendance component, covering the Employee portal with multiple ways to submit time (punching with clocks, web, mobile or Kiosk), as well as requesting PTO and approving time cards; Manager portal with analytics, group approvals, time sheet maintenance, GPS tracking and real-time attendance monitoring to keep your work-force running smoothly. We'll also review the built-in functionality that provides seamless integration between Vista Time and Vista .
9:00 AM	9:15 AM		Break	
9:15 AM	10:15 AM	Education	SQL 101: Simple Queries	Select: 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 work smarter!
9:15 AM	10:15 AM	Exchange	Reassessing Your Reporting	This administrative-oriented session will focus on gaining a better understanding of best practices in reporting within Vista. Topics will include understanding the use of PDS database views, how to incorporate Vista Security and its impact, linking reports within the application, and automating scheduling and delivery.
9:15 AM	10:15 AM	Technical	Upgrade Insights	Vista 7 released in 2017 introduces oodles of new opportunities for you to take advantage of. In this session you will learn more about Vista tools that will assist you in preparing for the upgrade, and during your transition. Our goal is to simplify your migration so that you can leverage the "Vista Opportunities" in this awesome new release.
9:15 AM	10:15 AM	Demonstration	Vista Workflow	Vista Workflow can help you automate consistent transactional procedures across your organization. In this demonstraion you'll learn about Vista configuration options, so you can build your own manager and employee self-service workflows to simplify your team's experience.

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10:15 AM	10:30 AM		Break	
10:30 AM	11:30 AM	Education	Workflow 101: Basics	This workshop is for tech-savvy administrators who have a working knowledge of SQL and Vista. Using a practical case study, you will initially create and test a simple Vista workflow: implementing approval processing for a basic self-service task—address changes. Once that is working successfully, you will then extend the workflow to take into account special requirements. For example, rather than always notifying payroll of changes, only route them to payroll if the taxing municipality or state changes. Likewise, similar rules can exist for benefits administration.
10:30 AM	11:30 AM	Exchange	Reinventing Performance Reviews	PDS has continued to add improvements to the Vista Performance Review process providing options to deploy reviews to your workforce either interactively using the Vista review wizard, or by bundle your performance evaluation into a workflow, that includes review and approval steps, and delivers the employee self-review via email. Learn more about how customers are deploying this powerful toolset.
10:30 AM	11:30 AM	Technical	Upgraded Tools	In this session we'll review some of the Vista architecture changes that have been folded into Vista 7. We will explore improvements that we've made to History, Database Views, Database Options, and Customizing.
10:30 AM	11:30 AM	Demonstration	Vista Reporting	The reporting session will cover the many options of reporting offered within Vista . We will demonstrate using and creating reports in tools such as Vista EasyAsk, Crystal Reports®, Vista Analytics and Organizational Charting.
11:30 AM	1:00 PM		Lunch	

Date/Time		Track	Session	Description
1:00 PM	2:00 PM	Education	Payroll 101: Setup	Learn the power of Vista Setup tables pertaining to payroll in this workshop. This workshop will introduce users to various payroll tables such as Earnings, Deductions, Tax Profiles, Payroll Status, Payroll taxes. We will first review setup tables, and understand how to setup a new codes for each of these tables and assign employees to specific code/codes prior to processing a payroll. We'll include some tips and best practices that are reported to our Support team and help you avoid future setup issues.
1:00 PM	2:00 PM	Exchange	Vista Workflow	If you haven't started using Vista Workflow functionality in your day-to-day processes, then plan on participating in this session. Learn how you can implement your business processes in Vista to reduce paperwork, improve efficiencies and automate manage approvals. We'll also take a look at a variety of process flows that Vista clients have implemented successfully.
1:00 PM	2:00 PM	Technical	Vista Security	In this session we'll review how Vista's secured views work to make your third party reports safe and sane, how our new offering with aPersona's two-factor authentication can secure your employee self-service, and how to use our security user exit to keep in-office activity in the office.
1:00 PM	2:00 PM	Demonstration	Technical Tools	The technical demonstration will provide you with a look at the technical toolset in Vista. We will demonstrate features in System Administration such as the Company Directory, Report Maintenance, Enterprise Server Jobs, Translation and the External Interface Tool. We will also demonstrate security and the many options available to you.
2:15 PM	3:00 PM	General	Closing Session	Wrap up the conference at the final session. Plan to gather contact information from your new acquaintances so that you can continue to learn about "Vista – An Oasis of Possibilities".