

PDS UGA 2023
USER CONFERENCE | MAY 9-12, 2023 | FORT WORTH, TX

Session Descriptions



**STEERING VISTA
INTO THE FUTURE**

Grab Vista by the horns.

Do you want to wrangle even more value out of your powerful Vista software? Then join us in Fort Worth in May 2023 for our 4-day conference. You'll gain valuable new insights, network with other users and our PDS team, and learn how to get the most out of Vista. The 2023 PDS UGA conference offers five tracks to help guide you to the appropriate session content: **General, Exchange, Technical, Education, and Demonstration.** The General track contains sessions that all PDS UGA conference attendees will participate in. The others are tailored more toward specialized areas of interest. The intent of the tracks is to assist you in clarifying the focus of the sessions, and aid you in mapping out your participation. You are welcome to attend any of the conference sessions and are not required to stay within a single track. Take a spin through these pages and see the intensive education that awaits you at the 2023 PDS UGA Conference.

Education

Each of our sessions explore one important Vista feature or process, offering attendees an opportunity to learn how to best utilize it within their business.

NEW! Your conference attendance also gives you access to 37 digital Vista workshops. These step-by-step product training tools will be available pre-conference!

Exchange

The Exchange sessions focus on product usage and features a variety of presentations from your peers.

By participating in these sessions, you will bring home ideas that you will be able to apply when you get home!

Technical

Includes an engaging mixture of educational presentations that delve into the more technical aspects of Vista.

System administrators won't want to miss the knowledge transfer that occurs here.

Demonstration

Provides scheduled product demonstrations for attendees interested in drilling-down into specific areas of the Vista product. This is a perfect opportunity to explore newer Vista components. Tap the knowledge of PDS experts and learn about what you don't know.

4 days
of educational,
Vista-focused
sessions

2 user wishlist
brainstorming
sessions
(let your voice
be heard!)

60
conference sessions
in five content tracks

37
digital workshops
on technical and
application topics



Register now!

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Benefits Plan Setup, Best Practices

Each year as you go through Open Enrollment season, you have an opportunity to review your overall plan setup and make adjustments - not just because of benefit changes thrust upon you but also to take advantage of new or existing Vista features that you might not have implemented in past years. In this session, we will share with you best practices developed by working with a broad array of customers. We'll not only discuss the practices but also walk you through the setup steps.

Performance Reviews

Are you utilizing all of the Vista features available to you when implementing your performance review processes? What type of reviews do you use -- manager reviews, self-reviews, 360 reviews, or all of the above? Are they formal and scheduled, or impromptu? What questions do you ask and can you do subsequent analyses on them? Join us for a review of the different Vista components to set up each of these scenarios, to implement them, and to analyze the results.

Leave Processing

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!

Workflow Basics

This session is a must for anyone who is not using Vista workflow or is just using it minimally. We will not only walk you through the basics of creating a flow and assigning it to a Vista screen and user set, but we'll also show you small extra steps to bring your flows to the next level. Moreover, we will allocate extra time to discuss and answer concerns that anyone feels is preventing them from taking the next step.

Requisition through New Hire

This is one of the most important and time-intensive areas of HR - the entire process of attracting, recruiting, and onboarding the best people in the best manner. This is also an area of Vista that continues to receive many enhancements to keep pace with the industry's growing needs. Sit with us for a walkthrough of the entire process, both from the perspective of the recruiter/HR-manager and of the applicant/employee. See the new Vista features in action and compare them to what you're currently doing to see what you can take home to immediately enhance your experience.

Make Your Analytics Sizzle!

Once you know what information you need to convey, you can create and deploy your Vista Analytics to the appropriate managers in just a few minutes each. But as with anything else, if you take the time to make your analytics richer in content, more flexible in usage, and cleaner and more enticing in presentation, you can make them much more impactful and effective. Join us as we walk through a few basic steps to transform basic analytics into sizzling must-haves!

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- Learning Management Basics** Integrate Vista Learning Plans into the overall Learning functionality. Step through the processes of inventorying employee qualifications, defining qualifications for employee roles, and tagging which courses lead to proficiencies in which qualifications. Then generate analyses of course deficiencies and employee skill deficiencies, before creating automated learning plans to address those.
- Payroll Processing - Best Practices** Sit with us as we walk through Vista, highlighting the best practices at each step of the way of your regular payroll processing schedule. We'll touch on some setup best practices that directly affect your day-to-day operations, as well as your monthly, quarterly, and annual steps.
- Security Advanced Topics** Regardless of how you have your Vista security currently set up, you'll want to join us for this session. The Vista security model keeps advancing to handle all of the nuances presented by different customer needs, as well as different Vista modules. Learn about all of the new Vista security features and watch how they can be applied whether to regular manager or employee self-service screens, to mobile screens, to Analytics, to workflows, and more.
- Mobile Configuration** If any of your employee base is under 35 years old (and even for many employees older than that), mobile is almost the exclusive way that they access any digital content. So, if you haven't spent as much time making sure that your Vista mobile experience is as good (or better) than your desktop experience, you're doing a disservice to your employees. Learn about all of the different options you have to set up and enhance your Vista mobile functionality, from look-and-feel to security.
- Onboarding** Once you have completed your new-hire process, there is still potentially a lot of work to get through all of your onboarding requirements. PDS has added significant new features to the Vista onboarding capabilities. Join us as we walk you through the setup and usage of these - from form completion and signing, to job and task scheduling, and more.
- Tailoring the Workflow Approval Screen** In the earlier Workflow session, we covered workflow fundamentals, so here we will focus on the experience you are providing to the workflow approvers and other participants. Learn how to make your screens and processes more focused, more impactful, and more useful by applying a few simple tweaks to your workflow setup.

Vista Health Check and Tuning

As with any powerful system, periodic fine-tuning and maintenance ensure optimal performance. Listen to the key take-aways **Barron Collier Companies** found from their last check. Learn the types of checks you should be doing regularly (with or without PDS services) to optimize every aspect of your Vista system.

Fast and Effective Recruiting

Today's recruiting world is fast-moving and precisely targeted. Learn how you can become nimble at setting up and posting requisitions, and then evaluating respondents the moment they inquire. Listen to how other PDS customers have taken advantage of the newest Vista recruiting capabilities to attain real-time recruiting.

Payroll Tips and Tricks

Many of your prior payroll best practices are still relevant, but some are affected because of how Vista has now streamlined the payroll process. We'll share how to ensure that your payrolls balance correctly and are processed in less time than ever before. Learn about the features that you should focus on as you transition this year to the latest version of Vista payroll.

Simplifying Benefits Enrollment

Benefits enrollment (especially Open Enrollment) can be the most time-consuming and stressful component of a Benefit Administrator's job. We'll explain the steps to follow to ensure that your processes and seasons go off without a hitch. And learn about the new Vista features to ensure that your next cycle will be even easier.

Managing and Using Employee Documents

Loading and saving documents, electronically signing them, populating fillable PDF forms, generating electronically sign-able forms - these and more are all becoming requirements for today's HR. Listen to how you can make use of the different Vista document features to handle these needs. Also learn about the new feature enhancements that are coming out to make these processes even easier.

Streamlining Onboarding and Offboarding

These two endpoints of an employee's career often involve the most effort, whether personnel resources, forms management, or legal requirements. Consider the common and sometimes different approaches that organizations like **Penquis/MOMCAP** are taking to make these processes most effective and most efficient. Learn and discuss what features might be most beneficial to you.

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Reports Exchange

Everyone has their go-to, can't-live-without report to help them manage their job. Compare and contrast the reports considered invaluable by other organizations. Discuss how they compare to your critical reports. And learn what reporting tools Vista provides to help you bring these together.

Rolling out Analytics

Vista Analytics is a powerful toolset with many display and configuration options. As such, it can be overwhelming to introduce all at once. Learn the steps that **Barron Collier Companies** went through to roll out Vista Analytics effectively and successfully to their management. Understand the tools available to you to help you do the same.

Configuring MyVista and Mobile App

In this session we'll dig into MyVista configuration and share tips on setting up the ideal configuration. We'll share a wealth of shortcut examples that will streamline your own implementation!

Learning Content and Management

There are many aspects to successful learning management, from identifying needs to making content available, to managing employee progression through that content. Listen how **Roberts Oxygen** are using Vista to successfully navigate these steps. Also learn what Vista will be offering in terms of additional content delivery options.

Stress-Free Quarter-End and Year-End!

Is Year-End a stressful time for your organization? Are you interested in learning some tips from pros who have put into place best practices for managing their Vista environment throughout the year so that they can enjoy the holiday season? Be prepared to gather fresh ideas and contribute your own suggestions.

Benefits Day-to-Day Tips

Even when enrollment season is not upon you, benefits management can take up a lot of stressful time. Not only is employee eligibility and activation on the line, but so are things such as payroll deductions and fringes, as well as compliance issues (e.g., ACA). Listen to the steps that other companies use to make sure that their benefits setup and processing runs smoothly week after week. And learn how Vista is making it even easier to do so going forward.

Creating and Deploying Analytics

Are you looking to introduce analytics and dashboards to your user base for the first time? Or open up other already-existing analytics to current users? Or are you ready to write your own analytics for your user base? We'll offer simple steps to accomplish each of these, and then review the experiences others have had and are having while doing the same. Make your future deployments smooth and impactful!

Vista On Premise vs. Cloud

Are you struggling to get enough IT resources to accomplish your organization's strategic Vista initiatives? Your team may be interested in learning more about operating Vista in the PDS private cloud, where PDS applies your updates and keeps Vista current. We will educate you on the differences of keeping Vista in your current environment or easily moving it to the PDS private cloud.

Managing Security

Vista security is based on the intersection of settings across multiple templates and dimensions - company, location, organization structure, application option, and more. Learn how to achieve the fine control you want. Learn how to determine the impact of proposed changes. Learn how to easily test and propagate proposed changes. And finally, discuss with your peers if your security approach meshes with others.

Advanced Payroll Configuration

Learn the payroll data model and the payroll process. Then apply them to better understand configuring Vista Payroll to handle all of your needs, interfacing it with external systems, and troubleshooting when issues or imbalances arise.

Managing and Configuring Vista Recruiting and Onboarding

These are the entranceways to your organization - first to prospective teammates and then to your new-hires. So, it's critical to make these inviting, understandable, and easy, while effectively projecting your corporate culture. Learn the simple steps to initially set these up and learn what you should focus on for ongoing maintenance and review. Discuss with your peers their best practices, along with PDS experts.

Making the Most of the Issue Detective and Notification Queue

Everyone knows you should regularly run the Issue Detective and handle any problems it finds. But do you know how to create your own issues to supplement the PDS-delivered ones? Do you know how to make these interactive so that they can be managed on-screen? Learn new tips and tricks and discuss usage with your peers.

Constructing Better Workflows

Vista Workflow should be an essential component of your Vista deployment strategy. It bridges the gap between complete employee self-service and closed administration. But as with any powerful tool, there are better and worse ways of accomplishing the same things. Learn why some approaches might be better than others in certain situations. Add some valuable tips, tricks, and tools to your own toolkit. And discuss the merit of different approaches with your peers and PDS experts alike.

Creating and Managing Vista Reports

Have you considered all of the ways to optimize your Vista reports? Do they run most efficiently? Are they properly secured? Are their input prompts simple (and secured)? Can users access them with one click? Get answers to these and more, with detailed explanations and discussions with your peers.

Introduction to the PDS API Library

Join us to learn more about the new PDS API library and how it can enhance your Vista experience. In this session, we will discuss how the library is structured and the technology layers that go into an API. We will also review specifics on end points, how they are made available, and discuss security implications and details on setup and configuration.

Vista Tuning

In this session we'll review ways to ensure that Vista continues to run smoothly for your users. We'll review steps that the PDS Cloud Operations team takes, plus other ideas that can be emulated in on-premise installations.

Troubleshooting Issues

When things go wrong, it's critical to understand what steps must be taken to quickly and then easily diagnose and fix the issue. And with a complex system like Vista there are many possible places to start. Walk through a methodical approach to most effectively diagnose what the true underlying issues are, and what needs to be done to rectify them.

Vista History

In this session we'll review the different types of history available to you within Vista, how they work, how to best use them, and how to manage them.

Vista Overview

The Vista Overview will be a high-level overview of Vista in its entirety. We'll take a walk through the entire employee life cycle. Everything from Recruiting, Onboarding, Training, Benefits, and Payroll, while empowering your employees with Self-Service and Workflows to drive efficiencies, reduce paper, and maintain history. We'll make sure to highlight new enhancements and reporting. 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.

Outlook Calendar Integration Overview

Come join us for a first look at our hottest new feature! Outlook Calendar integration will help you schedule interviews and meetings for your new recruits right from within the requisition! This demonstration will briefly show how to setup and use Microsoft 365 (formerly Office 365) within the Recruiting component.

Vista Recruiting

In this demonstration, we'll take a look at recruiting from all different perspectives: the applicant, recruiter, hiring manager, and administrator. We will demonstrate the many different possibilities that can be deployed from look and feel, creating profiles, posting to job boards, and hiring the best-qualified candidates.

Vista Onboarding

You're hired, now what? Take a look at Vista's new Onboarding to learn how it can make the onboarding process simple, efficient, and paperless! We will demonstrate the features through the experience of a new employee, discuss how the experience can be tailored, and all the new capabilities such as e-Verify, forms management, and new analytics to help make the onboarding process a success!

MyVista and Mobile App

Join us for a preview of our latest Employee Self-Service/Manager Self-Services features! Learn how the mobile app and MyVista complement each other as you enhance your employee's self-service experience!

Vista Payroll

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.

Time & Attendance: Core and Vista Time

Vista has different time solutions for different needs. During this demonstration, we will explore Time and Attendance in Vista - which allows your employees to enter time, request time off, and have project tasks assigned to them. We'll also provide a high-level overview of Vista Time, our enhanced, cloud-based time and attendance tool which allows rules-based time, schedules, shift swapping, and more. Both Vista and Vista Time offer many features that give your organization options to manage your workforce more effectively.

Vista Performance, Goals, and Learning Management

In this demonstration, we'll navigate how you can use Vista to develop your people with performance reviews, goal management, learning plans, and 360s. With Vista, you'll be able to assess staff performance, manage skills inventory, and set and track goals. Engaging your employees through Performance, Goals and Learning Management may help your organization increase productivity and decrease turnover.

Vista Benefits and Compensation

Improve the employee experience by using Vista's Open Enrollment for Benefits and once they've enrolled in benefits, we'll demonstrate the ability of individual-based analytics and reports that can provide employees with an overall view of the value of their benefits.

Vista Reporting

Data is information, information is power! In this demonstration, we will explore the extensive reporting tools available in Vista including Analytics, Crystal Reports, EasyAsk, and Issue Detective. We'll demonstrate multiple ways to schedule and deliver reports, adding reports to My Pages or as a favorite. We'll demonstrate options when exporting from a control, adding queries in EasyAsk, and how analytics can be placed on dashboards for ready access for your many different users.

MyVista and Outlook Calendar Integration

If you missed either the MyVista or the Outlook integration demos, or you just want to see them again, please join us as we revisit these two wonderful new features of Vista 7.2!

Personalizing MyVista

Personalizing MyVista and the mobile app using shortcuts and favorites is the topic of this demo session. Take a deeper look into different ways to configure and deliver content quickly to your employee and mobile staff.