



# Welcome to the Vista Solutions Book.

For more than 50 years, we've been proud to provide an HCM suite that is robust, strategic, and adds substantial value to our customers. Within the pages of this book, you'll begin to see how our suite of solutions can help your company succeed in ways you never thought possible.



## TABLE OF CONTENTS

About PDS and Vista .....	3
Recruiting .....	4
Onboarding .....	7
Human Resources .....	8
Benefits .....	13
Payroll .....	16
Time and Attendance .....	19
Self-Service .....	21
Workflow .....	23
Analytics .....	24
Reporting .....	26
Technology and Data Management .....	28
Security .....	31
Services .....	33
Contact Us .....	34

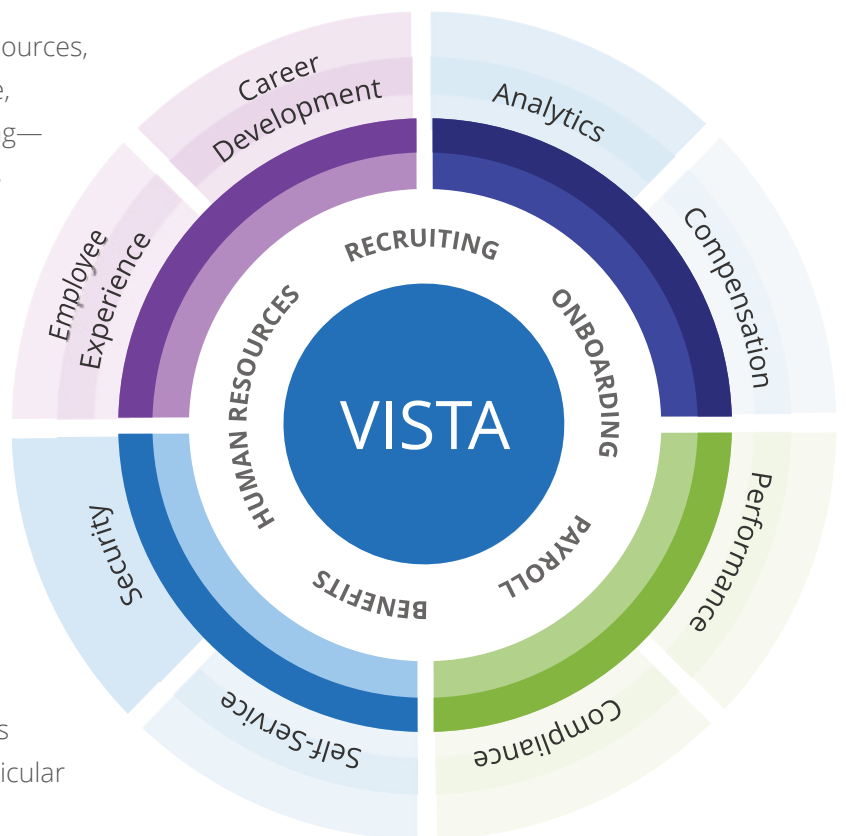
# About PDS

**PDS®** has been a leading provider of HCM systems since 1974.

PDS' Vista® is a core suite of recruiting, onboarding, human resources, payroll, benefits, time and attendance, self-service, workflow, analytics, and extensive reporting components. Its intelligent cross-border capabilities manage U.S., Canadian, and Caribbean employees in a single database. It provides comprehensive tools to help you securely manage and deploy data across your enterprise and includes tools to provide Analytics and Key Performance Indicators (KPIs), along with extensive workflow capabilities.

## **PDS' Vista is the complete HCM software solution for organizations with employees based in the United States, Canada, or the Caribbean.**

All the pieces—recruiting, onboarding, human resources, benefits, payroll, time and attendance, self-service, workflow, analytics, mobile and extensive reporting—come together to simplify your business practices and processes. PDS serves a wide variety of organizations in many different industries, including professional services, finance, healthcare, retail, manufacturing, utilities, transportation, hospitality, non-profit, education, government, and others. Organizations are able to take advantage of the benefits of our cross-border, single database architecture that automatically presents employees with appropriate U.S. or Canadian page content, based upon their citizenship. Although a single, integrated HCM and payroll solution, Vista's individual components can be deployed in phases according to your particular needs and priorities.



## RECRUITING



Capturing and effectively tracking recruiting data is vital to the success of your company.

**Vista Recruiting** is easy to use and maintain and presents critical applicant information in an efficient and useful manner for both human resources professionals and hiring managers, alike.

Vista Recruiting is all about ease-of-use, starting with your applicants themselves. This component allows you to gather applicant data via a personalized extension to your corporate website and provide applicants access to the Vista Recruiting Applicant website. Applicants can view your open jobs, descriptions, and qualification requirements.

When interested applicants log into the site, they can build their own unique applicant profile and identify their interest in any available jobs within your organization at that time. They have the ability to tell you about their experience and how they may fit your particular openings, as well as apply directly from their smartphone through a step-by-step registration process. Applicants can receive appointment and test notifications and easily interact with the Recruiting team via email or text messages.

### YOU CONTROL THE RECRUITING PROCESS

Vista Recruiting gives HR departments complete command over the entire hiring process for each department in every location while more easily tracking and controlling costs, improving applicant management, strengthening relationships with applicants, and reducing paperwork for the HR team.

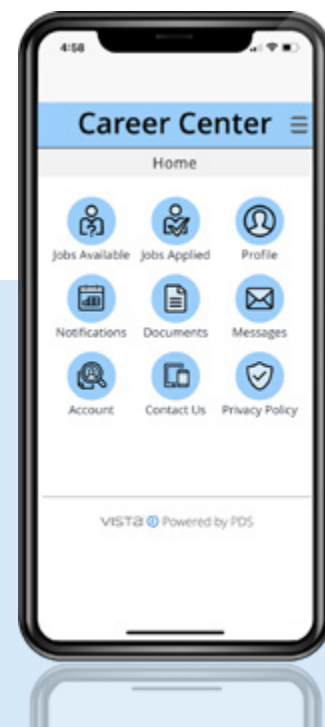
Depending upon the role of hiring managers during the recruiting process, employment applications and resumes can be easily shared with hiring managers. Dynamic real-time dashboards of applicant data, combined with comprehensive reporting capabilities, allows easy information analysis. Help to reduce and eliminate drop-off during the applicant registration process by auditing applicant data using Vista's Analytics.

### Key Vista Recruiting features include:

- Integrated HR & Recruiting platform where you manage from "recruit to hire"
- Promote openings internally and externally
- Seamlessly direct new applicants to your personalized Recruiting portal from your corporate website
- Recruiting portal provides an intuitive platform where users can build their unique applicant profile, attach critical documents, search for jobs, and easily apply
- Recruiters can easily qualify candidates using criteria that you define (e.g. skills, education, licenses, qualifying questions)
- Applicant ratings automatically scored by the Recruiting portal, based on user-defined qualifications for each requisition



- Dashboards of actionable analytics
- Applicant documents easily transfer to new employee record upon hiring
- Recruiting integrations available to provide communication directly between Vista Recruiting and the Indeed/Career Builder job board websites
- Posting capabilities directly out to Indeed/Career Builder job board platforms without leaving Vista



## MOBILE RECRUITING

Applicants are spending more time searching for their perfect job from their mobile devices. Is your Career Center ready to accept and guide them through the application process? Vista Recruiting enables you to keep your consistent employer branding and messaging to complement your corporate career center pages, while improving candidate engagement and streamlining the hiring process.

### Make It Your Own

Vista offers the ability to tailor your applicant job portal to be an extension of your corporate website and allows you to fine-tune your messaging to attract relevant talent. Whether applicants are applying from their desktop or their mobile phone, they can learn about your openings and apply for job opportunities with ease. Do you have multiple lines of business requiring different job skills? No worries. Vista allows you to easily configure your portal to present jobs grouped into various categories for specific target audiences, such as graduates and current students, or administrative jobs, for example.

### Manage Openings

With Recruiting, users can create and track open positions and jobs and maintain information such as job title, type (new or replacement, etc.), requirements, descriptions, and expenses incurred while filling the position. User dashboards help comb through the volumes of applicants in your pool and highlight relevant candidates by matching job requirements with the applicant data collected.

Using a variety of criteria to search your applicant pool, Vista enables you to rank your applicants using ratings for attributes such as skills, education level, degrees, licenses, and other elements to find the best matches. You can also search keywords in the text of uploaded resumes to help find the hidden “gems”.

## Manage Openings (continued)

In addition to selecting qualified candidates from applicant records, users can match job requirements with existing employee data. Streamlining the search process is critical to finding talent.

Recruiters may allow applicants to upload documents, such as a resume, cover letter, or references, for example. This simplifies sharing the appropriate documents with others involved at any point in the hiring process.

Users can track related expenses such as travel reimbursements, hotel costs, meals, and entertainment and relate them to individual requisitions and applicants. After interviewing qualified applicants, users can easily document each interview and any testing results.

## Stay In Touch

With Vista Recruiting, communication has never been more efficient. Applicant correspondence can be automatically triggered. You configure templates based upon specific actions such as thanking the applicant for applying, or notifying them when a position is filled, for example. The system can then automatically trigger emails using the built-in mail system, when an event occurs.

Hiring is also easy. There is no need to re-enter data because all applicant data captured becomes part of the new employee's record. In addition, any applicant documents that have been collected, such as a resume, driver's license, or employment application are copied to the new hire's document library.

Vista Recruiting includes a variety of useful reports so that you don't have to "recreate the wheel". In addition to standard analysis reports, we've streamlined your recruiting process by delivering tools such as a formatted application form that will collect applicant data into a consistent layout for hiring personnel, and one-click letters to simplify the generation of applicant offers. These reports and many others are easy to produce with Vista's powerful data management and reporting capabilities.

## Analyze Results

The recruiting process is data intensive. Vista Recruiting provides advanced analytical tools to help interpret data, present it in a simple visual way, and take action when needed. Using Vista dashboards, you can easily analyze any applicant and requisition data such as; the number of applicants by disposition, number of hires, days to fill for individual requisitions, and quantify hire sources. When useful, you can drill down into the data itself, and if needed, with a single click, download data into a spreadsheet!



## ONBOARDING



**Vista Onboarding** provides an opportunity for all businesses to do more to ensure that new employees become productive and satisfied members of their staff. Onboarding helps you consistently and efficiently convert new hires into engaged, empowered, productive employees.

Vista Onboarding provides your company with tools that allow you to introduce new employees to the organization and the company culture and begin to help them feel comfortable. With easy configuration you can provide employees with a virtual checklist of to-do items, an FAQ's page, and your own organization content. You'll be able to easily embed a virtual version of company documents, details of their job responsibilities, and using Adobe Sign™ or DocuSign™ integration, have new hires electronically sign documents (i.e. various HR, benefit, and payroll forms) that are needed prior to starting.

The Vista Onboarding framework also leverages other useful Vista tools that you may use during onboarding, such as tests and surveys. HR administrative users can easily manage pending new hires, view where they are in their onboarding checklist, communicate reminders, and assist where appropriate.

Employers with federal contracts or subcontracts that contain the Federal Acquisition Regulation (FAR) E-Verify clause are required to enroll in E-Verify as a condition of federal contracting. As part of Vista HR, we've developed an interface with E-Verify to perform employment eligibility verifications. This integration simplifies your processing of new hires, since a newly hired employee must have a case submitted within 3 days of hire. Vista delivers the integration you need to automate this task by delivering integration with the U.S. Department of Homeland Security's E-Verify Web Service to allow for employment eligibility determination during the onboarding process.

### Key employer onboarding features include:

- Welcome new employees using Vista Onboarding
- Provide a unique new hire login
- Educate pre-hires on your corporate culture
- Configurable pre-hire checklist
- Identify new hire forms that must be collected
- Collect additional personal information for new hires
- Simple visibility into new hire progress on their tasks
- Make the new hires first day more productive!
- Onboarding reports and analytics
- E-Verify automation



## HUMAN RESOURCES



Your employee data is the heart of your corporate knowledge base. **Vista Human Resources** unleashes the power to make that data strategic. Within Vista, you create and maintain an organized database of employees, applicants, jobs, and positions. The product's flexibility allows you to structure your corporate data as simply or as complicated as your business needs require. Use it to easily track your employee data, perform detailed calculations, create reports, and maintain a repository of detailed history.

### KNOWLEDGE AT YOUR FINGERTIPS

Vista Human Resources gives you immediate access to employee addresses, phone numbers, Social Security/insurance numbers, and emergency contacts. You can also track employee educational background, skills and store related electronic documents.

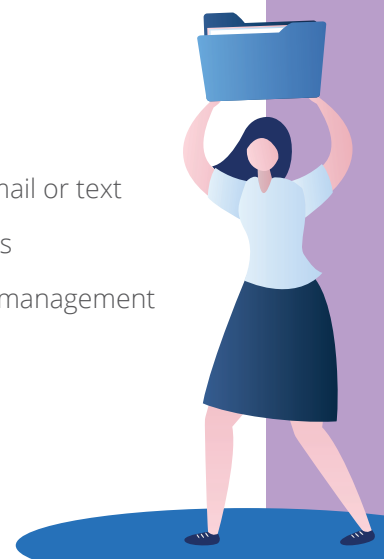
And that's just the beginning.

Vista also lets you easily stay in compliance with government-mandated programs such as in the United States: EEOC, OSHA, FMLA, ADA, USCIS, and HIPAA; with standard reports to facilitate filing. In Canada, ROE and AERS reporting can be easily supported. In addition, Vista provides you with the tools to quickly create models, simulations, graphs, charts, organization structures, and ad-hoc reports. You can also easily extract employee data for use in another tool.

Vista also streamlines the ability to perform a variety of personnel actions, such as status changes, terminations, new hire, re-hire, role changes, and rate changes in a consistent manner. Consistency in these processes will improve data integrity across the organization.

### Vista Human Resources key features include:

- Complete HR administration
- E-Verify integration and automation
- Engagement and employee experience
- Position management and budgeting
- Compensation management
- Learning management
- Performance management
- Succession planning
- Intuitive employee and manager self-service
- Workplace safety and risk management
- Competencies/skills
- Licenses, certificates and achievements
- Organizational reporting hierarchies
- Extensive historical tracking
- Deploy access via mobile devices
- Electronic signatures
- Workforce communications via email or text
- Dashboards of actionable analytics
- Accessible and secure document management



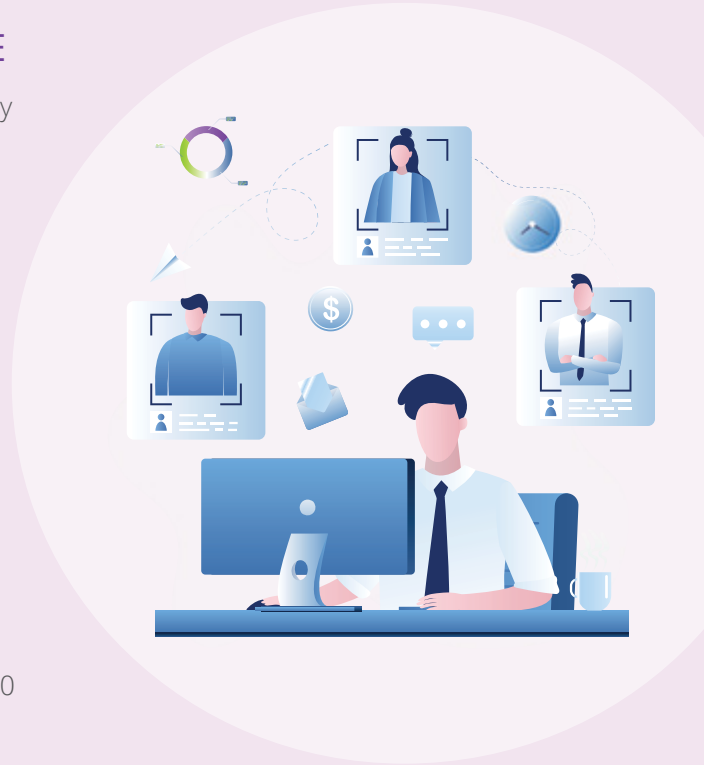


## ENGAGEMENT AND EMPLOYEE EXPERIENCE

Vista's employee engagement features allow staff to easily search, interact, and engage with others across the organization.

We know that gathering and listening to employee feedback is critical to your corporate culture. We've embedded a survey tool that simplifies your ability to create surveys and collect answers to your important questions within Vista Self-Service.

The Vista Employee Directory offers simplified employee engagement using a visual window into your organization where users can interact with their fellow employees. This powerful self-service tool can be configured to unlock as many functions as you are ready to activate, such as Profile, Notes, To-Do List, FAQ, Wall, Feedback, and even 360 Reviews.



**E-Verify Integration** Employers with federal contracts or subcontracts that contain the Federal Acquisition Regulation (FAR) E-Verify clause are required to enroll in E-Verify as a condition of federal contracting. As part of Vista HR we've developed an interface with E-Verify to perform employment eligibility verifications. This integration simplifies your processing of new hires, since a newly hired employee must have a case submitted within 3 days of hire. Vista delivers the integration you need to automate this task by delivering integration with the U.S. Department of Homeland Security's E-Verify Web Service to allow for employment eligibility determination during the Onboarding process.

### Position and Job Management

Every company manages their employee structure differently. That is why with Vista you can manage your organization not just from the perspective of employees, but also from a job viewpoint. You can easily drill down through the organization to see who reports to whom.

A wide variety of job and position data can be tracked, such as qualifications, applicants, complete position history, dates, pay, and budgeting within a control group.

Based on internal and external dates that you define, job postings can be automatically published on your company Job Center or your corporate recruiting site.

Viewing the organization from a hierarchal perspective also allows uniformity in security templates, workflow management, and directory services. Workflow

## Position and Job Management (continued)

routing can be dependent on the job/position so that even during change or reorganizations the approval process runs smoothly. Vista offers a visual organization charting capability of your staff. You no longer need to use a third-party tool to visualize your organizational structure.

In addition to providing a visual picture of your organization, Vista also provides a financial view of the organization using the same hierarchical perspective. Once budgeted hours and dollars have been defined for roles within the organization, budgeted versus actual statistics can be easily gathered and presented in graphical analytics.

## Compensation Management

Vista supports each phase of the wage and salary process, beginning with automatic notification of scheduled reviews through the analysis of actual pay increase activities. Through a combination of data, workflow, and flexible reporting you have the ability to configure Vista to how you administer wages and salaries.

Job tables with mass updating capabilities facilitate job and pay grade restructuring, while maintaining current salary survey benchmarks. Within job tables, users can analyze increases by budget centers or by jobs across the entire organization. Vista provides the ability to perform 'what if' scenarios, submit pay rate changes for approval, generate reports to communicate changes to employees and automatically implement increases based on the effective date. It can also help you analyze pay parity by gender or by job.

## Workforce Budgeting

Vista Position Budgeting gives you the ability to manage your personnel budget and view the results easily. Vista provides the ability to budget the number of positions (or jobs) within a control group, calculate the actual counts, and issue a warning if the number of budgeted seats or full-time equivalents (FTEs) is exceeded. You decide what a control group represents, for example a department, or a project team. You also have the ability to define budgeted dollars for each control group. Vista calculates the actual salaries based upon the employees assigned to that control group. Control groups are then attached to each position.

Vista allows you to define the type of action to take when planned budget levels are exceeded. When a position (or job) is added or updated, you decide whether to issue a warning, yet allow the update, warning and do not allow the update, or issue no warning.

Vista Budgeting analytics then offers the ability to view Budgeted FTEs versus Actual FTEs by Control Group. With the proper authority, users can drill down into a specific group and view the individuals assigned to the group, assign or remove individuals and edit the budgeted values.

## Performance Management

Vista Performance Reviews offer complete flexibility in defining unlimited review templates (i.e. 3-month, annual, 360) along with the related criteria (frequency, calculation of ratings, visibility of comments, allow document uploading, etc.).

The review process in Vista can be easily personalized to match the way your HR department conducts reviews. You decide whether your organization allows employees to access an interactive wizard to step through each appraisal category (e.g. performance, job knowledge, goal, etc.) or you prefer a prepackaged review form that can be completed by employees. In addition to the variety of review types, Vista provides the ability to override or add appraisal types for specific roles (position groups, jobs or positions).

Weight factors for appraisal categories and the rating result values can optionally be used to calculate appraisal results. An actionable report is presented within each review to allow managers to easily report on review details. Analytics are also provided to deploy access to managers with the information that they need to act on upcoming reviews.

Vista performance management also encompasses goal management as it is often related to performance reviews. At the employee level, individual performance review history, and a detail page which includes Goals, Achievements, Awards, Disciplinary, and Feedback data are available.

## Learning Management

Vista provides your HR team with the tools needed to define, manage, and plan corporate learning. The course enrollment process has been simplified so that you can more easily manage your learning plans. The Learning Management component offers the ability to create, track, and manage courses; as well as provide custom learning plans for individual employees. Users can choose to limit self-service enrollment to only those courses assigned to an employee's learning plan; or open self-service enrollment to all available courses. Class rosters and available courses for learning plans reporting are also available to keep managers informed of the progress of their direct reports. Furthermore, as courses are completed, an employee's record is automatically updated with resulting new skills, certifications, licenses, etc.

## Succession Planning

Vista uses your position qualifications and employee skills to provide intelligence on possible candidates who might step into a job opening, today or in the future. Once candidates are identified, using the Succession Planning dashboard, users have the ability to then easily manage possible candidates based upon their fit. Career planning and development can be better managed across the organization.

Vista Succession Planning is managed by position. The Succession Planning page allows you to generate a list of employees who may be qualified to fill

## Succession Planning (continued)

the selected position based on its required qualifications. This includes many qualifications: courses, degrees, licenses, and skills entered for each employee. Miscellaneous qualification criteria can also be added to whittle down candidates such as 'lives in PA', 'Age 18 requirement', etc. In addition, you are able to add specific employees who you may want to coach through the succession process by identifying missing position qualifications.

The Succession Planning dashboard provides the ability to drill into individual candidates and define a status ranking (e.g recommended, under consideration, not recommended), and a numeric ranking. Notes and action items may also be collected. Qualifications for the individual employee are provided as well.

## Standard Reports

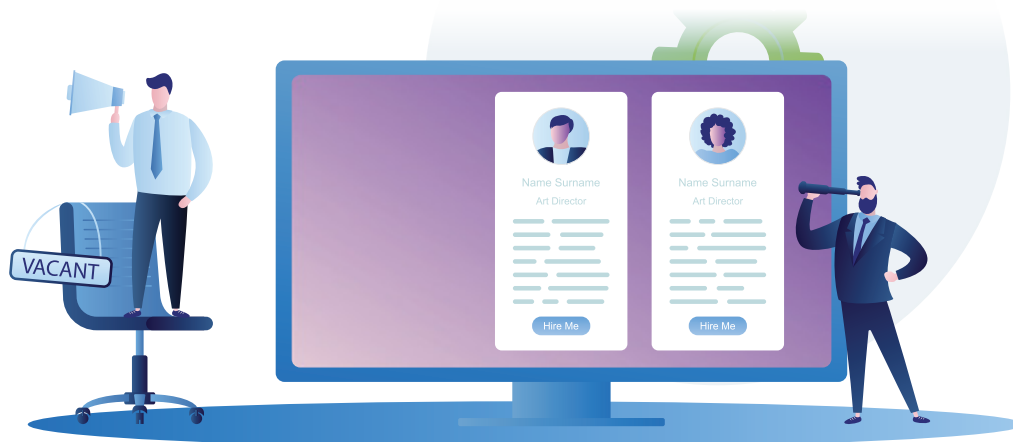
Vista's reporting is extremely flexible. Hundreds of standard reports are delivered with the Vista solution so there is no need to 'start from scratch'. PDS delivers compliance reports for Human Resources, Benefits, and Payroll and continues to enhance them as requirements change. All reports can be easily modified. Vista Reporting also provides you with the ability to add your own reports, and even reuse parameters that will make it easier for the end-user to drill down into the data they need.

## Offboarding

When turnover occurs, whether it be a resignation, termination, or retirement, Vista facilitates the offboarding process by guiding the user through the appropriate steps, consistently.

- The offboarding process steps include:
  - Vista provides multiple status codes that allow you to define the HR Termination date, separately from the Benefits and Payroll Status dates.
  - Termination reasons and rehire recommendations can be collected.
  - Deactivate position, security access, and deductions.
  - Review any balances for leave that require payout
  - Review company property (computer, keys, etc.) issued to the employee and facilitate the return.

In addition, the Offboarding process can automatically trigger communications to other departments such as notifications to Security department so that badge is disabled, notification to IT to disable network account, etc.



## BENEFITS



Benefits administration has become more complicated. Simplify it with **Vista Benefits**. From eligibility to enrollment to employee benefits statements, our Benefits component provides you with automated tools that ensure accurate results.

Vista Benefits allows you to maintain detailed information on an unlimited number of benefit plans and coverage levels for each employee and automates the processes involved in determining eligibility, calculating premiums, and appropriate payroll deductions.

### Vista Benefits key features include:

- Complete benefits administration
- Automated eligibility and enrollment
- Enrollment wizard that guides employee selections
- Open enrollment processing
- Benefit enrollment management (current and open)
- Benefit employee communications
- Unlimited plans and coverage levels
- Dependent and beneficiary maintenance
- Tax deferred processing
- Tax deferred matching
- Affordable Care Act (ACA) administration
- Future enrollment
- Leave time accrual and tracking
- FSA/HSA account administration
- COBRA eligibility
- Life event enrollment
- Employee wellness
- Benefit statements
- FMLA management
- Reporting of employer benefit costs
- Integrated EDI 834 reporting
- Pension reporting
- Mobile access for remote employees and managers
- Dashboards of actionable analytics
- Electronic signatures

By automating the benefits administration process, manual filing of papers and producing reports becomes a thing of the past. Your employees will have all their benefits information at their fingertips. Your power users will be able to generate any necessary reports or analytics required by your organization, benefits carriers and federal or state governments, including the ACA reporting requirements.

The result is the ability to effectively analyze your organization's total benefits offerings and determine if they meet your employees' needs, as well as your organization's objectives.



## AUTOMATED ELIGIBILITY AND ENROLLMENT

Vista allows you to define your organization's benefit plans by entering benefits eligibility and enrollment criteria within setup tables. These configurations provide a means to automate eligibility determination, and enrollment and deduction start times.

In fact, any field may be used as an eligibility component, allowing you to easily handle exceptions. You can also control the formulas for calculating premiums and coverage amounts using simple setup. Vista does it all for you!

### Open Enrollment

Vista's open enrollment processing feature allows you to select your new benefit year changes without impacting your current benefits information. This includes the ability to change eligibility criteria, premium calculations, valuation formulas, and employee coverage selections. Vista provides an open enrollment wizard for employees to make their open enrollment elections through self-service.

### Employee Communications

Vista Benefits offers simplified communications of employee benefits eligibility and participation via self-service. You can bring more visibility to your "hidden paycheck" by sharing employee and employer costs throughout the year. And, you can provide easy access to your benefit carriers by delivering simple links to each vendor via self-service.

### Leave Time Accrual & Tracking

Vista provides the tools to automate the calculation and accrual of various leave categories, such as vacation, sick, personal, or paid-time-off; as well as track the details related to other types of leave, including FMLA events. Vista provides self-service users with the ability to request time off from their desktop or mobile device, and have it flow to their manager for approval.

### Tax Deferred Processing

Vista Benefits enables automatic tax deferral processing (i.e. 401(k), 403(b), 457, Roth, RRSP). Features include eligibility definition, discrimination testing, loan processing, fund matching, and multiple fund tracking.

## Affordable Care Act (ACA)

Vista provides a comprehensive range of functionality to ensure that you can manage, track and comply with all of the employer shared responsibility provisions of the ACA. Vista provides automatic scheduling and calculation of initial and standard measurements to determine employee healthcare eligibility and stability periods.

You can simplify tracking the movement of hours to manage those employees moving up to or down from the 30-hour ACA mandate. It also enables the generation of IRS-ready 1094-C/1095-C transmission files for any number of applicable large employers (ALEs), with extensive validation to ensure accuracy and correctness according to the IRS-published error validations.

You are able to easily comply with the requirement that recipients consent to 1095-C electronic delivery and provide printable or electronic delivery of 1095-Cs to recipients. PDS also offers extensive support, training, integration, and other ACA services, including printing and delivery of forms.

## PAYROLL

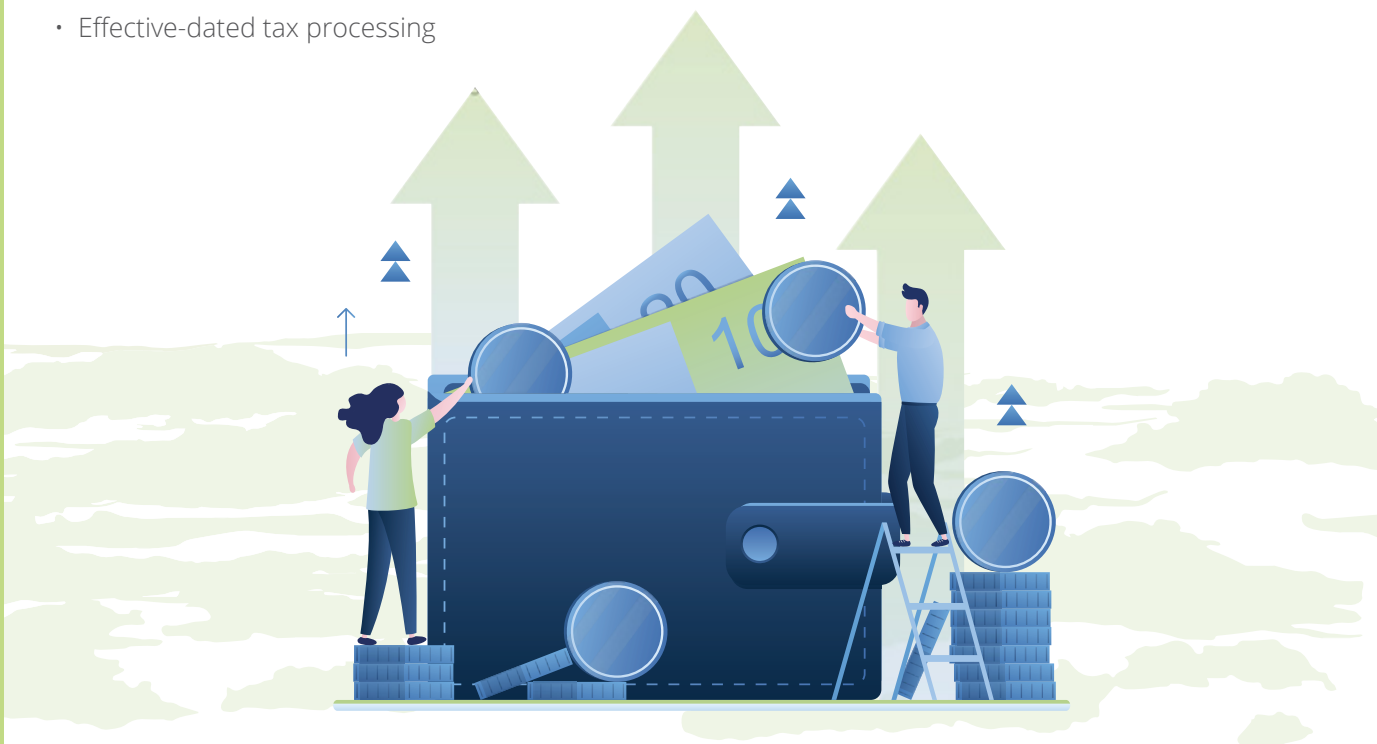


**Vista Payroll** strikes the perfect balance between power and simplicity. With its high-performance capabilities and design efficiency, you can process large volumes of data within tight time constraints, whether U.S., Canadian, or Caribbean.

Vista Payroll is focused on its main tasks of calculating pay, creating paychecks, producing payroll registers, and federal, state, local, and provincial tax reports. At PDS, we devote special attention to designing comprehensive functions to automate your special requirements for manual checks, check reversal, relocation expenses, retroactive pay increases, wage attachments, and labor charge overrides.

### Vista Payroll key features include:

- Payroll administration and processing
- Time collection, calendars, and auto-pay generation
- U.S. federal, state, and local tax reporting
- Canadian federal and provincial reporting
- Self-service access to paycheck history
- Self-service access to W-2s and 1095-Cs
- Job cost accounting
- Check calculator
- Retroactive processing
- Leave time accrual and tracking
- Effective-dated tax processing
- Tax maintenance service
- Wage attachment processing
- Tax reciprocity
- Labor distribution and general ledger
- Extensive historical tracking
- Standard reports and English-language query tool
- Optional tax filing service with one of our partners
- Mobile delivery of pay stubs
- Workflow approval and notifications
- Dashboards of actionable analytics





## Multi-Tasks and Functionality

No matter what the setting—office or plant, manufacturing or services, single facility or multiple locations—Vista provides you with complete payroll functionality.

Vista's multi-organizational system lets you process multiple pay cycles simultaneously and multiple checks per employee at multiple rates and cost centers. The system also provides you with advanced features such as multiple direct deposits, automatic deduction arrearage collection, automatic check reversal, mid-pay payrate increases, user-defined earnings types and calculations, pre-tax deductions and job cost accounting.

You can also perform multiple state taxing, as well as federal, state, and local tax deductions. In addition, the system is coupled with an ongoing tax maintenance service for up-to-date taxing information. All payroll data is easily accessible using the many PDS standard reports, Vista EasyAsk query tool or Vista Analytics.

## On-Demand Check Calculator

Along with the standard payroll functions, you can also calculate and process an individual paycheck in real-time—eliminating manual check writing. You can enter various pay categories (regular, vacation, overtime, etc.), override or enter new deductions or adjust gross pay and taxes.

This feature allows for:

- "What if?" analysis of net pay and taxing options
- Elimination of manual calculations
- Multiple pay rates and pay codes
- Override capability for deductions and taxes
- Automatic updates of the employee's payroll history, check reconciliation, and general ledger information

## Pay Check History

You (or your employees through self-service) can access employee paycheck history by employee name and date range to answer questions about earnings, taxes, deductions, and labor costing, thereby eliminating the need for printing of pay advices.

## Earnings and Deductions

Vista's earnings and deduction tables with pre-tax capabilities enable:

- User definition of all earnings types, calculation formulas, premium rates, taxation, and garnishments
- Pre-tax deductions
- Easily modified formulas and special premium rates
- Hours and dollars tracking
- Weighted averaging calculations and shift differentials

### Flexible Benefits

Vista offers automatic calculation, taxation, and tracking of pre-tax deductions with complete reporting.

### Time Collection

Vista includes a variety of time collection tools for employee, administrator, or manager time entry that is streamlined with self-service, and the manager approval process. Vista delivers the means to collect time for your workforce, whether time is entered via hours worked, by projects and tasks, or by exceptions only.

### Time & Attendance Interfaces

Vista Payroll integrates to Vista Time (optional) or interfaces to any time and attendance tracking system with automatic input to payroll for processing and allows exception and override input. It also eliminates manual input and reduces errors and provides total control of employees' time data.



### What our customers say:



Lee County Clerk's Payroll and the Lee County Board of County Commissioners printed close to 5,000 1095-C versa seal forms for our 4 companies that we process payroll for, 2 retiree companies and 12 companies that we do not pay, but are on the BOCC's benefit plans.

We could not have accomplished such a feat if it were not for the terrific support we had from PDS.



*Barbara Cobb, Lee County Clerk of Courts*

## TIME AND ATTENDANCE



Accessible from anywhere, **Vista Time**® is a cloud-based service, providing flexible time and labor management for your decentralized workforces. A full variety of data collection methods are available within our Vista Time component, including biometric and swipe card devices, mobile devices, a self-service time entry clock, iris scan, and integrated telephony, making it ideal for telecommuting or flexible workforces.



### Some of the key features include:

- Easy time entry from anywhere via online, mobile, clocks, kiosk, or telephony
- Project/task tracking
- Labor-cost forecasting with unlimited labor levels
- Multiple time collection detail
- Manager and employee time review and approval
- Attendance tracking with automatic integration with leave accruals
- Full integration with payroll reporting and analytics
- Manager and employee dashboards
- Time entry rules
- Drag-and-drop visual resource scheduling
- Geolocation/geofencing for limiting where employees can punch in/out
- Attendance tracking including forecasting accrued time at a point-in-time
- Proactive alert
- Tracking of employee occurrence or points

## Two, unique dashboards for fast access to key features

Vista Time includes Manager and Employee Dashboards. The Employee Dashboard allows your employees to easily clock in and out through self-service when biometric or swipe card devices aren't required. In addition, employees can check their hours, schedules and accrual balances; communicate about time issues using the messaging system and receive action alerts.

Vista Time's Manager Dashboard presents a snapshot of employee activity. Icons in the top right of the menu bar warn of exceptions and missing punches, allowing the manager to deal with those quickly and efficiently.

## Virtual Scheduler

Vista Time's Visual Scheduler helps generate schedules easily and efficiently. Breaks and meals can be added and are dynamically controlled by payroll policies.

Click and drag schedules to copy them from employee to employee for quick schedule assignment.



## Iris Time Clock

For touchless environment needs, we offer the Iris Time Clock that verifies a user's iris biometric and/or personal identification number and offers touchless punching in or out. Visual and audible prompts assist users with proper use and positioning in front of the device.

## SELF-SERVICE



With **Vista Self-Service** your employees – onsite and remote – have immediate access to their information. And the built-in, comprehensive data security layers ensure that employees have access to only their own personal information.

Providing employees and managers with access to their own HR, benefits, and payroll information gives them the freedom to easily review and modify their personal data. They can do it on their own time from their mobile device, at the office, or at home, without having to wait for the HR team to get the information to them or make a change.

Data can be easily configured to require approval, providing secured, monitored data updates. Of course, this takes a load off the HR and payroll departments, but it also empowers the employees.

### Key features of Vista Self-Service include:

- Self-service templates to improve employee engagement
- Employee access to view or update their information
- Guided benefits enrollment self-service tool
- Default date formatting with optional user override
- Manager self-service access to the activities they need
- Advertise open jobs to your own employees
- Mobile access for remote employees and managers

### SELF-SERVICE IS NO LONGER OPTIONAL. IT'S EXPECTED!



According to *Sierra-Cedar's 2019-2020 HR Systems Survey*, 88 percent of respondents are or will be leveraging Employee Self-Service applications and 78 percent are or will be using Manager Self-Service applications by 2021.

Most businesses today are pressured to manage their costs while improving efficiencies. Vista Self-Service can help you achieve both by allowing you to deploy access to your employees and managers to the activities that they need, where and when they need them.

## Employee Self-Service

Employee Self-Service can provide your staff with the ability to review and modify their own personal data, easily and quickly. Employees will be empowered by their ability to get to their information in a timely manner and not always require communication with HR or payroll. And, our out-of-the-box Employee Self-Service tools also enable you to easily share content and engage with employees.

Vista Security allows organizations to decide what data should be available to employees and whether they can make changes themselves to addresses, dependents, emergency contacts, and optionally require approvals. Other data can be shared such as sick/vacation/PTO balances, payroll check history, and more.

We recognize how important photo images are to allowing employees to better engage with others. Self-Service users can easily upload and edit their own photos within Vista and you have the option to require administrator approval.

Your employees can enter their own timecard and submit their time to their manager for approval. By deploying online access to paychecks, W-2s or T4s, you can eliminate paper and streamline communications. Employees can also enroll in benefits using a step-by-step open enrollment wizard that presents them with eligible benefit options, and intuitively leads them through the enrollment process. Additionally, you control the level of data access; view-only, update or update with approval.

## Manager Self-Service

Manager Self-Service can provide your line managers with the tools to manage their direct reports more efficiently. You control what functions managers can perform, and what data they can access using Vista security tools. For example, depending upon their roles, managers may initiate requisitions, perform performance reviews for their staff, and generate reports on-demand. By enabling your front-line managers, they can take ownership of their organization and make your organization more efficient.

Update or view-only functionality enables managers to inquire or update information such as company property, courses, direct deposit, education, employee tests, leave accruals, licenses, position information, restrictions, skills, union information, W-4 and/or T-4 information, and more. Managers can enter time for their employees, or administrators can gather the time and managers can approve it prior to payroll processing.

Access to employee information isn't limited to your desktop! Regardless of logistics, your managers can access their team's data from a tablet or mobile device.

## Additional Features

Depending upon your workforce, and their span of control, you may deploy additional Vista features. Vista offers complete configurability to define appropriate data access to Vista users.

## WORKFLOW



The **Vista Workflow** engine is integrated throughout Vista, so any action can be automated through an approval process.

Our Workflow features were built for you because you need the ability to manage the approval processes for employee transactions, monitor transaction activity, and re-route activity when necessary.

### Key features in Vista Workflow include:

- Approval process automation
- Eliminate paper approval forms
- Route appropriate information to participants
- Simplify participants' ability to act on necessary changes
- Notifications through Vista and email
- Approvals processed via mobile devices
- Approvers can approve, correct, or reject requests
- Easily add attachments to the workflow
- Filter specific data to ensure privacy
- User-defined conditional steps
- Easily re-route flows as needed to handle temporary situations (e.g. vacations and turnover)
- Delegate individual workflow activities to an assigned proxy
- Configure more complex workflows requiring responses (e.g. opt-in to e-delivery)
- Maintain historical transaction activity
- A variety of workflow reports to analyze your ROI
- Different workflow templates can be defined to handle different situations, such as different system tasks, people, or timeframes
- Configure specific scenarios to handle exceptions (e.g. rate changes over x amount require two approvals)
- Automatic notification of delayed workflows to prevent bottlenecks



### AUTOMATION AND CONSISTENCY

Different people process data differently. Vista Workflow ensures that there is a consistent process in place each time a change occurs, whether manager approval is required or whether HR reviews each change.

## ANALYTICS



The data in Vista is a goldmine of valuable information. When you deploy our **Vista Analytics** component, you'll turn your HCM data into actionable information—allowing better business decisions.

The Vista Analytics component is a tool that can help you jump-start understanding what business drivers your organization needs to explore, to maximize the return on your human capital investment. Vista Analytics provides users with secured, relevant, engaging dashboards and more than 100 predefined analytics that offer immediate value.

Vista delivers the tools to help you gather data from across your enterprise, and present it in a more engaging, meaningful way. It enables you to replace hard-copy reports with graphics that make sense to the people that need to know. Visuals are only useful if they're understood, so Vista includes the tools to communicate your message.

By replacing hard-copy reports with engaging content, you can easily deliver summarized data in a more meaningful, intuitive way. Or if your content contains columns of data, then list your data grouped the way you need it. Click into the data to drill down and get to a more detailed list, or even open an employee page to edit the corresponding data. With a single click you can navigate to the data you need. And if you want the data in a spreadsheet, you can export the data with one click.

In addition to reporting upon data within the HCM database, Vista Analytics also allows you to create new data within the database that can then be used for analysis using Key Performance Indicators (KPIs). KPIs are a measurable value that can help you demonstrate how effectively your company is achieving key business objectives. For example, if you were asked to produce monthly turnover statistics by location, or the number of applications that come in each day—do you even have this data available today? Vista Analytics includes the tool to define, schedule, and collect data over time so that you can begin to analyze, report, and begin to truly identify trends within your organization.

### Key features of Vista Analytics include:

- Configurable dashboards of actionable analytics
- Hundreds of predefined analytics
- Drill-down into actionable data
- Simplify navigation to get users to their “to-do” list (e.g. my new applicants)
- Data audits and alerts can be easily viewed
- Give line managers the data that they need
- Various graph options are available
- Advanced metrics and analysis screens
- Export data from analytics with one click
- Automatically collect statistical data in your organization for reporting and later analysis
- KPI data is completely configurable to capture the data that you need





## DYNAMIC DASHBOARDS

Through dynamic dashboards, Vista Analytics provides real-time visibility into important metrics that users can easily drill-down on for more details. Analytics dashboards allow users to simultaneously view multiple analytics, providing easy-to-understand, visual expressions of complex data. And, dashboard pages can be personalized to display a group of user-selected analytics.

### Configurable Dashboards

It's all in the packaging! Vista Analytics offers the ability to format the presentation of dashboards that you deploy to your enterprise. Depending upon the audience, you may prefer to deliver specific content on dashboards for managers, but allow your executives broader access, and let them select their own content. Your options are unlimited.

### Pre-defined Analytics

Out-of-the-box, we've delivered hundreds of sample analytics that present Vista application data in useful presentations. Examples include a variety of recruiting, onboarding, HR, benefits, and payroll lists and graphs. These examples will be valuable in getting you started in understanding the power of analytics. Many analytics illustrate various capabilities you may want to leverage when developing new analytics that clarify your business drivers.

### Drill-down into Data

Vista Analytics offers a configurable way of delivering distilled information, with the option to drill-down into further details. For example, a headcount analytic might present a graph which visually shows the count of employees by company, but by drilling into a company, the user might be able to view the list of employees themselves, and by clicking into the employee, they are able to open the employee's record.

Another example might be a list of employees missing a primary phone number, and when the user clicks into an employee, they open that employee's phone page. This method of delivering data simplifies finding information and taking the appropriate action. Make your data actionable!

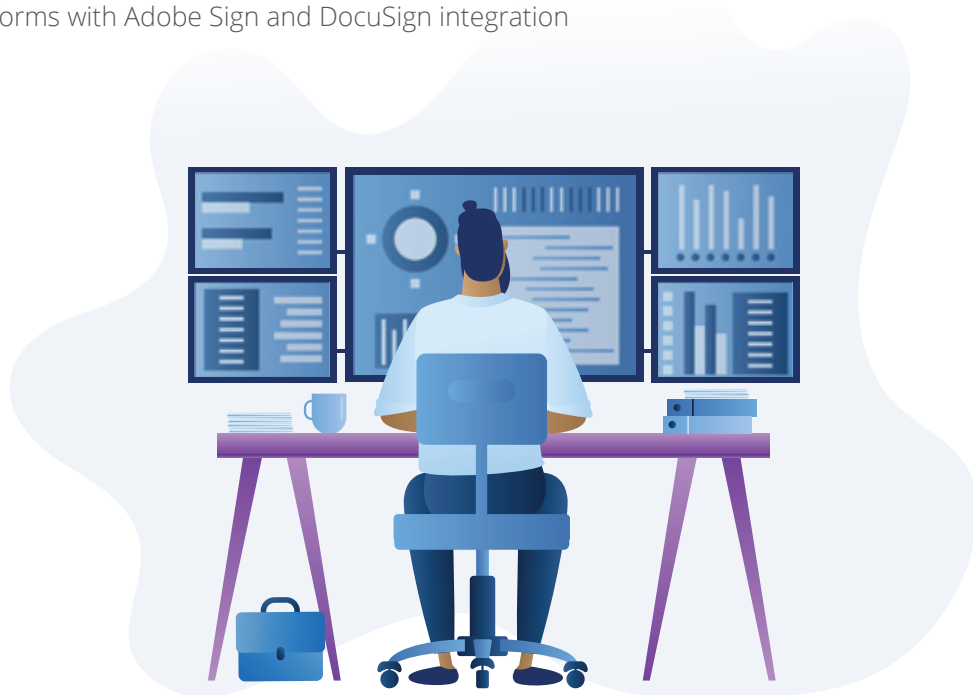
## REPORTING



Your data is strategic. **Vista Reporting** gives you instant access to it, providing immediate results for decision-making. For recurring reports, you can easily schedule them to be run automatically and have them delivered via email. Get your data when you need it, automatically!

### Key features of Vista Reporting include:

- Hundreds of pre-formatted, parameter-driven reports
- Save results in a variety of formats (pdf, xlsx, etc.)
- Parameters to simplify drill-downs and reuse them
- Automatic scheduling of reports
- Effective reporting on historical information
- Meaningful metrics reports
- A library of administrative, manager, and self-service reports
- Automated organizational chart integration
- Hundreds of database views
- A library of line manager reports
- Users view report data for only their employees
- Deploy reports and forms where your user needs them!
- EasyAsk comprehensive English language query tool
- Forms (e.g. application, offer letter, etc.) can be easily configured and automated
- Automate forms with Adobe Sign and DocuSign integration



## Standard Reports

Vista Reporting is extremely flexible. Hundreds of standard reports are delivered with the solution. PDS delivers compliance reports for HR, benefits, and payroll and continues to enhance them as requirements change. All reports can be easily modified. Vista Reporting also provides you with the ability to add your own reports, and even reuse parameters that will make it easier for the end-user to drill down into the data they need.

Vista standard reports utilize a variety of delivered database views which are joined with existing Vista security. This further 'locks down' the data, thereby allowing you to use a single report but have individuals only see the data that they are authorized to see.

Report output can be extracted into a variety of formats; Excel, Word, or PDF, for example. You decide what data you need, how you want it formatted, and when you want it delivered. It's that simple.

## Vista EasyAsk®

Vista EasyAsk is a tool for managers to access information in your Vista database without technical assistance. With Vista EasyAsk, you ask business questions in business language and the tool does the rest, automatically and dynamically. Vista EasyAsk translates your question to the programming language required to access the database and formats the result as you need it.

Vista EasyAsk provides the user with the tools to easily gather information without having to know the Vista database structure. You'll be presented with a simple-to-use query tool where you can select from a list of existing questions or type in your own.

Select your data from the list of tables and columns and select the 'add to query' button to build your request.

Results can be displayed or downloaded as a document, chart, or spreadsheet for ease of review and distribution. Yes, Vista makes it easy!

## e-Signatures

Has your organization adopted e-Signature tools to help automate processes? Would you like to automate the signing and management of employee documents? Vista allows you to streamline the signature of employee documents using Adobe Sign™ and DocuSign® integration.

No need to collect manual signatures as you'll be able to configure your own employee documents. Along with your corporate Adobe Sign™ or DocuSign® license, Vista integration will deliver the tools for you to automate employee signatures on important corporate documents.

Whether you want to capture a signature in your Vista Recruiting, Onboarding, HR, Benefits, or Payroll you'll be able to configure, deliver and then store signed employee documents.

## TECHNOLOGY AND DATA MANAGEMENT



Vista's product design and future technology direction are based on the understanding that effective human capital management is the central repository for a company's most critical resource – its employees. The best HCM offers the right combination of technology and functionality and allows employees from various departments to do their jobs better. Using state-of-the-art technologies, Vista helps you move your organization into the future. Our applications provide modern innovations that you can leverage.

Whether deployed in the PDS Cloud or on your premise, Vista delivers tools that you can leverage to optimize your use. We've designed the product using technology that makes sense and gives you the tools that will let you operate most efficiently.

Our fresh interface uses responsive design that presents more features at your fingertips than ever before. The Vista interface allows you to easily personalize the look and feel so that you can reflect your own corporate image.

Our technology features are built for you and put you at the core of everything we do. Here are some examples of our technology advancements:

- Open architecture
- Powerful automation
- Easily configurable
- Easily customizable
- Advanced security functionality
- Cloud-based or on-premise options
- Third-party integration
- Seamless updates
- Point-in-time historical data capture
- Content translation
- One-click exporting
- Fully automated workflow
- Electronic signature
- Electronic forms
- Workforce communications via email or text messages

We've also delivered a variety of tools that will make Vista work for you today and tomorrow.

### Issue Detective

Vista offers the means to audit your data and easily notify the appropriate individuals of necessary action required. When data inconsistencies are found, whether they be in HR, benefits or payroll, Vista delivers notifications of an error condition along with a recommendation on how to eliminate the issue. Notifications can be routed to different owners for resolution. No need to wait for a data issue to cause problems – Vista's Issue Detective lets you know before it becomes a problem.

### Translation

Vista includes a translation component that lets you deliver the system to your diverse workforce. If you've deployed self-service functions to staff outside of the U.S. Canada, or the Caribbean and want to localize the user interface, you have the means to do so. And, if you need to modify the Applicant Recruiting portal for different countries, we've given you those tools, as well.

### Vista Export

You no longer need to involve IT when you want to extract data. Vista Export provides one-click exports at your fingertips and only to those individuals with access to the specific data.

### E-Sign

Streamline the signature of employee documents using Adobe Sign™ or DocuSign® integration. No need to collect manual signatures as you'll be able to configure your own sign-able documents. Along with your corporate Adobe Sign™ or DocuSign® license, Vista integration will deliver the tools for you to automate employee signatures on important corporate documents and store the results by employee.

### E-Forms

Vista E-Forms capability allows your users to complete PDF forms through Vista using predefined form mappings. And while we deliver the following preformatted forms: Federal W-4, I-9, and TD1, users can upload their own fillable PDF forms and map each individual field to a Vista field. This allows for both loading information from the database to preload form fields and saving information to the database to capture desired information from uploaded PDF forms.

## Two Deployment Methods

We know that every business is unique. That's why PDS offers our customers the choice of two deployment options: PDS Cloud or On-Premise. With the PDS Cloud, PDS will manage Vista, your database, operating system, and hardware at its Tier 3 Data Center. Your environment is configured for your individual use. PDS delivers three instances of the Vista database (production, test and training) to better facilitate the update process. With the PDS Cloud you have access to your system on a 24/7/365 basis, along with the comfort of a full mirrored site backup and disaster recovery.

Vista's On-Premise option remains a solid, secure choice for many organizations that want their HCM environment in-house. The same powerful Vista application resides in your data center, and PDS provides system updates via VistaFresh to deliver enhancements.

## VistaFresh

Getting compliance updates and product enhancements is easy! VistaFresh provides you with the means of getting updates to the system where and when you need them. You can configure your testing environments to automatically download updates. It also allows you to identify any areas within the system that you may have personalized so that your custom changes aren't overwritten. With VistaFresh, you can schedule updates to your individual environments when you're ready.

## SECURITY



Security control is in your hands. Using **Vista Security's** comprehensive array of features and options, you have the complete ability to specify and monitor user access to HR, benefits, or payroll data.

The Vista Security model allows you to easily configure your system to ensure that the right people have access to appropriate information. Access rights are granted to specific system users, either individually or by using general purpose role-based security templates that apply to user groups. Using groups simplifies and organizes security into understood roles (or access levels), and exceptions can be given to specific individuals if necessary.

The individual User ID determines the applications, pages of information, and data a user is permitted to access. Using Vista position and job hierarchy, managers can be granted access to direct reports without any additional security setup. Access rights may be set to None, Read-Only, Workflow, or Full Access. A setting of workflow initiates a pre-defined series of steps that you configure for data update transactions. In Vista, you can secure access for applications, pay companies, organizations, and/or locations with pre-defined templates that are assigned to group users.

### Key Vista Security features include:

- Easily configurable
- Role-based security templates
- Protection from malware in uploaded documents
- Secured third-party access



## Active Directory

Vista supports active directory integration and acts as a SAML 2.0 compliant service provider (e.g. Ping, OKTA, ADFS, Azure AD).

## Encryption

PDS also supports SHA256-RSA encryption, TLS1.2 connections, along with database encryption at the database level.

## Secured Third-Party Access

When individuals access Vista data for reporting or through third-party tools, your information is protected. Our security model provides a variety of secured database views that can be helpful in report generation or data exports. Reports can be created that produce different results for different users, as only the appropriate data sets are delivered based upon a user's individual data access rights.

## Configurable Controls

The system includes support for STRONG passwords including configurable password validation methods that allow you to control things such as the length, format, and casing of passwords. Security logging provides the ability to track security access throughout the application and the flexibility of deciding whether to log all sign-on and page access activity or whether to track only failed attempts.

Access to the Vista application itself can be controlled as well, depending on your network enterprise configurations. Standard Windows authentication methods apply, such as anonymous and Windows integrated authentication, in addition to non-Windows based methods such as LDAP.



## SERVICES



At PDS, service is one of our highest priorities. That's why our team of experts knows your name. Whether you're looking for Vista support, real-world situational training or options for professional services and delivery. PDS is here for you, so you can experience true peace of mind.

### Customer Support

PDS is dedicated to providing the best maintenance and support available. Our Customer Support group is exclusively dedicated to the day-to-day needs of our customers and our team knows your name. Our support services include:

- "Click-and-download" software releases (VistaFresh)
- Unlimited telephone and email access to our support staff
- Support hours: 8:30 a.m. to 8 p.m. (Mon-Thurs.)  
8:30 a.m. to 5:00 p.m. (Fri) Eastern Time
- 24x7x365 emergency support
- Toll-free service calls
- Downloadable tax compliance updates
- Quarter-end support
- Year-end support
- Dedicated service portal
- Access to online support request tracking
- Access to PDS Support video library
- PDS Technical Support
- PDS User Group Association (UGA) membership
- Access to technical white papers
- PDS Blog with articles written by your peers

### Training

PDS' customers train using live software in real-world situations. Our hands-on interactive model enables users to achieve Vista mastery by offering training courses in all aspects of the software. Courses include training on recruiting, onboarding, human resources, benefits and leave accrual, payroll processing, reporting, analytics, Vista EasyAsk, and for on-premise customers, Vista administration.

### Professional Services

At PDS, we have over 50 years of experience implementing HCM products. We employ the most seasoned, industry experienced HCM, payroll, and benefits specialists. Through our broad expertise, we enable our clients to consistently implement the PDS system on time and on budget, so you can immediately begin to recognize a return on your investment.

In addition to implementation, our services cover areas such as: Vista Health Check, Open Enrollment assistance services, ACA filing and printing services, W-2 printing services, PDS Wellness Program for Year-End preparations, and Vista Business Services.

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