DART Version 3.1

Release Notes

Contents

Overview

Welcome to version 3.1 of DART, our most comprehensive update so far, containing many new features, including:

- Advanced Organisation Structure functionality
- Reporting details for Managers and Authorisers
- Dynamic Security
- Workflow for Alerts

These features are explained in more detail in the following document:

Version 3.1 Organisation Structure Customer Doc

The above document explains the actions that you will need to carry out in order to start using the new functionality. It is important that you read this document, as this is a more complex upgrade than in previous versions, and requires some forethought before the new functionality can be used.

Don't worry, you can upgrade and carry on using DART for your day to day actions, such as starters, leavers, contract changes, etc, but you will not be able to make any changes to your Organisation Structure until you have followed the instructions in the above document. We would therefore advise that you perform the necessary actions as soon as possible.

Along with the aforementioned features, we have made many more changes to DART, some of which are listed below:

- You will now be able to reference people using their name
- We have spread the icons out on the Setup menu, so they are more readily available
- You can now manage your Alerts at person level, via a new Manage Alerts option
- Changes to configuration information will now be audited
- Benefits and Allowances have been added
- You will now be able to view the reporting details via new person windows, and in List All
- Security restrictions can now be applied to the individual sections of the New Person and Modify Basic Details windows
- Limited details can now appear on the Calendar where No Access applies to that information
- The Pay Details on Job Details will now be calculated automatically
- You can now carry out List All searches on Documents
- You can now attach or import multiple documents at the same time
- It is now possible to export to existing Excel spreadsheets
- Workflow Email has been added to New Person and Modify Basic Details
- We have moved Cost Centre to Job Details, and removed the start and stop dates
- New conditions have been made available to List All
- It is now possible to specify Genders other than Male or Female

These, and other changes, are explained in more detail in the remainder of this document.

Upgrading

You must ensure that you are on version 3.0 of DART before you upgrade to version 3.1.

If you are on a version lower than 3.0 then you must upgrade your database to 3.0 before attempting to upgrade your database to version 3.1.

This document explains the changes that have been made to DART in version 3.1. The instructions for upgrading to this version can be found with the installation files.

Note: if you are on DART Cloud, we will upgrade your database for you, so you do not need to worry about that side of things. There will also be additional actions required by yourself in order to upgrade the Organisation Structure – this is explained in the document mentioned on the previous page.

We have changed the way that access to new functionality is defaulted in this version. In previous versions, all DART Users automatically had access to new features, and you had to use the Profiles window to remove access where appropriate. This has now changed, and the upgrade will now transfer the access rights down from the level above the new feature, e.g. if you have Users that have 'Read Only' access to the Setup menu, then any new options that we have added to the Setup menu will also be set to 'Read Only' as part of the upgrade.

We would still advise that you spend some time ensuring that your security conditions are correct before allowing other Users to log onto DART, but the changes that we have made in this version, and in all other version going forward from now on, will hopefully make that task a little easier.

When you open a Profile on the Security Profiles window, you will still be presented with a list of new windows that have been added in this upgrade, so that you are aware of the changes, and can then use that list to make any necessary security changes.

Using Name in DART

We have made a couple of changes that we hope will make it easier to find people in DART.

Prior to this version, people's names in DART were shown in the format of Title + Initial + Surname, e.g. Mr J Smith. We have changed this so that it is less formal, and people's names will now appear as First Name + Surname, e.g. John Smith.

We have also made it so that you can now type the person's name into the Find box at the top of DART, and it will take you straight to that person. Currently, you have to type the person's Person ID into the field, or click the Find button and select the person using Show All People or via List All. Now you can just type John Smith into the field, as shown below:
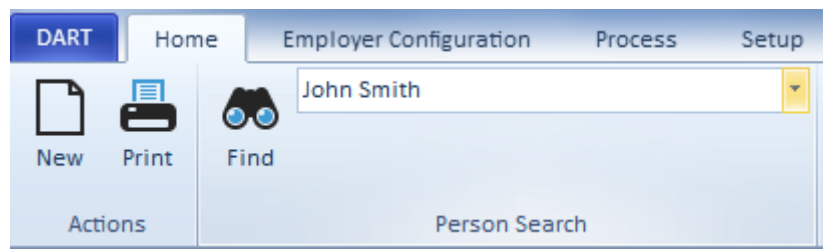
This will take you straight to John Smith's record.

You don't even need to know the full name of the person – you can just type the surname if you wish and, providing there is only one Smith, then you will be taken to that person. If there is more than one Smith, you will be presented with a list of people with that Surname to choose from.

You can even type the first name, or even just the start of the first name or surname, and DART will attempt to find the person that you are looking for. If more than one person might apply, you will be given a list to choose from.

We have added Name to the default data items that always appear when you do a List All search. Currently, only the Person ID is output, but we feel that it would be much more useful for you to see the name as well as the Person ID.

We have also changed the Person field on the Security Users window so that you select from a list of people's names, rather than having to type in their Person ID, and have even added a Find button to the Users window, if you are unsure of which person you are looking for.

We hope that this makes it much easier to find people in DART, without you having to keep a list of Person ID's handy, or having to use Show All People or List All every time.

The Setup Menu

You may remember that we changed the Setup menu in version 3.0 so that HR, Payroll and Training were amalgamated into a single Setup menu, with dropdown options for each one, as shown below:
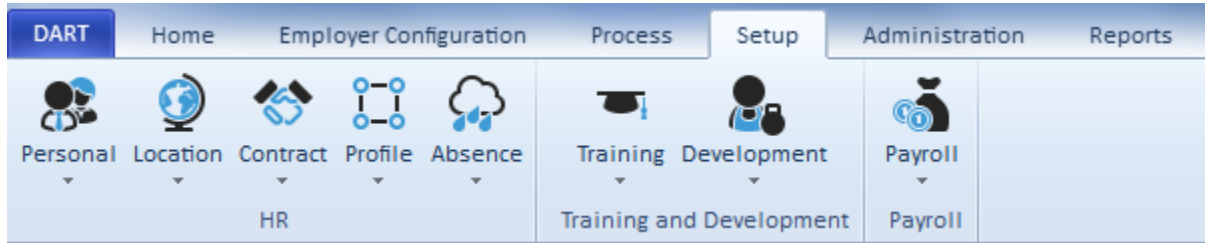
As this didn't make it obvious as to where to find each menu option, we have now expanded the Setup menu and rearranged the options, making them more visible, as shown below:
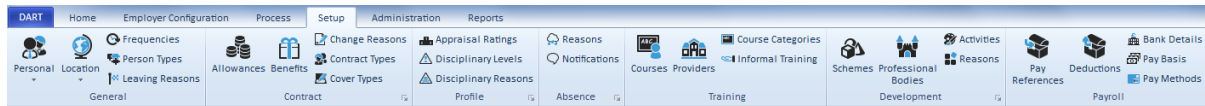
You may notice a couple of new options on this menu – these will be explained later.

Managing Alerts at Person Level

You can now view and manage Alerts for each person individually, via a new option in the list of person windows called Manage Alerts. This will appear below View Calendar in the list, and will present you with the Alerts window, showing just the Alerts for that person.

This will work in the same way as the My Alerts and All Alerts window, i.e. if you double click on the Alert Type in the list then you can action the Alert, and double clicking on any other field in the list will open the Alert itself, thereby letting you view the required actions, and change the Status, User or Notes, if necessary.

If you right click on the Manage Alerts option, you will be able to List All, or print, the Alerts for that person.

Organisation Structure

We have made major changes to the Organisation Structure functionality within DART. Prior to this version, you could create Organisation Units, and assign Parents to create a structure, but there was no way of viewing the structure itself, and everything was based at a single point of time, i.e. there was no ability to record historical or future changes.

DART now provides the ability to maintain a history of your Organisation Structure, and to view it as an actual structure, rather than just a list of Organisation Units. We have also taken this opportunity to move away from calling them 'Organisation Units' and will now refer to them as 'Departments'.

The existing Organisation Unit button on the Employer Configuration menu has been replaced with an Organisation Structure button. Next to this is a new button called Department Overrides, as shown below:
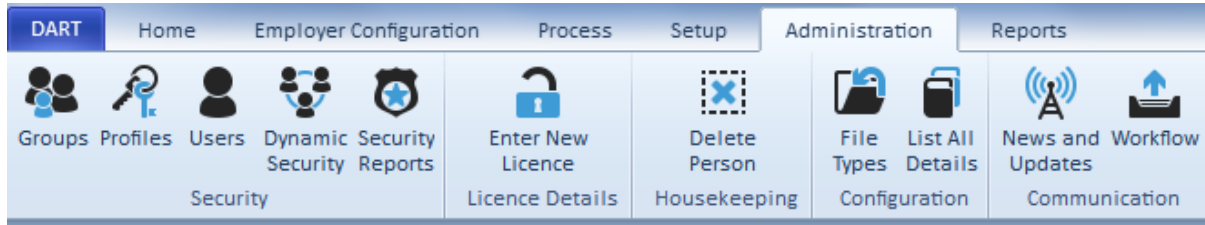

These new options are explained in more detail in the document mentioned on page 3 of these Release Notes, but the highlights are as follows:

- When you first click on the Organisation Structure button, you will be guided through a set of windows that will help you create your Organisation Structure for the first time – this will use your existing Organisation Units as the basis and, once you have corrected any errors and answered the required questions, you will be presented with a view of your structure, ready for you to review and save. Note: please do not attempt this until you have read the document mentioned on page 3 of this document.
- As well as letting you define the definition and location of each Department, the Organisation Structure window will also let you see where people are within the structure, and to move people around by dragging and dropping them from one Department to another. You will also be able to move Departments by dragging and dropping them to a new location.
- You will also be able to specify Managers and Authorisers for each Department, which will then be used to generate the Reporting Details within DART. You will be able to view the Reporting Details via new sub-menus below Manage Job in the list of person windows, and via List All. The Organisation Structure and Reporting Details will become the engine of DART, driving other functionality such as Dynamic Security and Workflow, both of which are also explained in the document mentioned on page 3 of these Release Notes.
- Reports will also be included, as well as an Organisation Chart feature.
- You may notice that three new Change Reasons have been added in Setup; 'Changed Department', 'Department Details changed' and 'Moved to Unallocated'. These are used by the Organisation Structure feature when it generates new Job Details entries. You can change these to other Change Reasons of your choice, if you wish, from the Options section of the Organisation Structure window.

Dynamic Security

We have added two new options to the Security section of the Administration menu, called Dynamic Security and Security Reports, as shown below:

These are explained in more detail in the document mentioned on page 3 of these Release Notes, but the highlights are as follows:

- Prior to this version of DART, you defined the people that each User can see by either selecting the appropriate people to include/exclude at User level, or by using Groups to group people together, and then assigning a Group to a User.
- This will still be possible, but an alternative method has now been made available, called Dynamic Security, which lets you define generic rules regarding 'who can see who'. Rather than defining a list of people that each User can, or cannot, see, Dynamic Security lets you create a set of criteria that can be applied to multiple Users.
- Dynamic Security uses the Organisation Structure and Reporting Details to determine which access level to assign to a User, i.e. whether they are a Manager, Authoriser or neither, and then uses that to determine which people a User can see.
- Each criteria will be assigned a Security Profile, which means that you can have different levels of access for people that the User can see.
- With Dynamic Security, when new starters join your company, or people move from one department to another, there is no need to update the access rights for the Users to take this into account – this will be maintained automatically by DART, so that your Users will always have up-to-date access to everyone that they can see at the current point in time.
- The Security Reports are also new – these will let you report on User details and access levels, so that your Security administrator will be able to see 'who can see who' at any given time.
- You do not have to use Dynamic Security if you find that it does not suit your requirements. The existing Security method will remain and you can continue to use this as before, if you wish.
- If you do wish to use Dynamic Security, your existing Users can continue to use DART via the existing security method for now, while you create your Dynamic Security conditions, in preparation for switching over. Once you are happy with the setup of your Dynamic Security, you can switch your existing Users over to be dynamic.
- You do not have to choose one over the other – you can have some Users as Dynamic and some can continue using the existing method, if you wish. For example, if you have an administrator who will always have access to everyone, then this User could continue to use the existing security method.

Workflow

This is a new function within DART that can send emails to the appropriate people, advising them that they have certain actions to carry out, such as authorising holiday requests. Workflow will work alongside the existing Alerts within DART, thereby giving an additional reminder that something needs to be done.

Workflow is accessed via a new menu option on the Administration menu, as shown on the previous page. The document mentioned on page 3 of these Release Notes explains Workflow in more detail, but these are the highlights:

- The new Workflow option on the Administration menu will be used to specify who receives the emails, and to switch each Workflow on (and off again, if necessary)
- Each Alert has its own Workflow – some require an email to be sent immediately, whereas some are sent when the Alert date becomes near, e.g. the Appraisal Alert
- Workflow uses the Reporting Details to determine who the Manager and/or Authoriser is for the person affected by the Alert. The email address is then taken from the new Workflow Email field on the Basic Details person window
- You can designate whether you want the email to be sent to the Manager and/or the Authoriser, as well as whether you want the employee to also receive a copy of the email
- You will also be able to specify an email address to use as your HR department – this can then be used as a Workflow email recipient, if you wish
- A Catch-All Email Address will be required – this will be the default Email Address that will be used when Workflow cannot identify the person to send the email to
- Workflow will also automatically assign the Alert to the appropriate User, which means that, as well as receiving an email, the Alert will also appear in the list of My Alerts for that User

If an Alert is assigned to you for someone that you do not yet have access, e.g. someone is moving to your Department soon, and that person has entered a future Holiday request, you will be sent the email advising that a Holiday request requires authorising but you may not be able to see that person in DART yet, due to the fact that you are not currently their manager or authoriser.
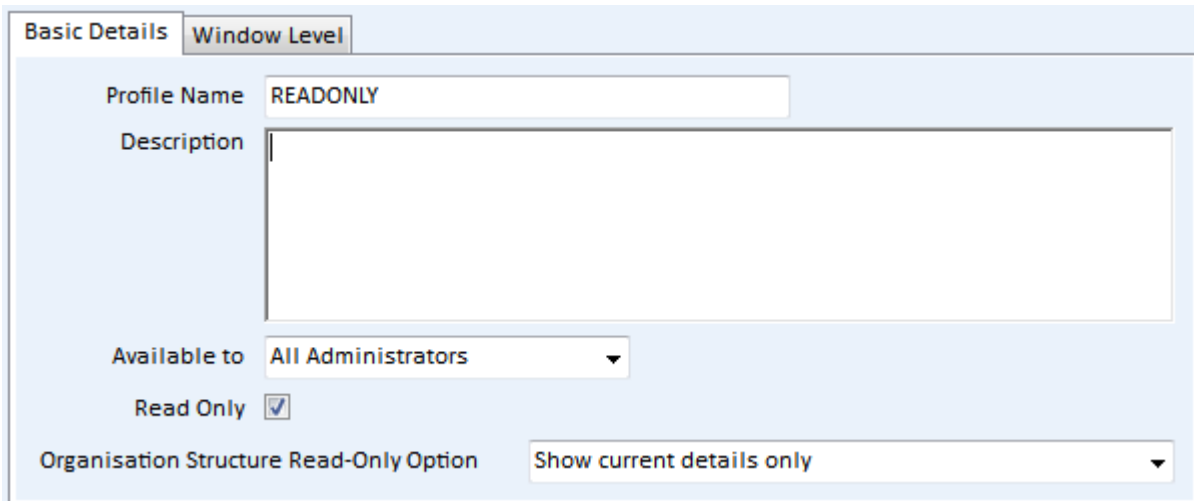
When this occurs, the Alert will appear in your list of My Alerts, so that you are aware that an action is required at some point, but you will not be able to open the Absence to authorise it until you have access to that person.

You can then either assign the Alert back to their current manager or authoriser, for them to action, or leave it in your list to action when that person does become one of your reportees.

Read-Only Organisation Structure

You may wish to give some of your Users the ability to view the Organisation Structure, but not to make any changes to it. This can be done via Security, by setting the access level to Read Only for the Organisation Structure window.

We have also given the ability to go one step further, and specify whether you want a User with Read Only access to be able to see all historical changes, including previous and future changes, or just the current Organisation Structure. This option appears on the Security Profiles window when you set the Organisation Structure to Read Only, as shown in the example below:

The available options are:

> Show all details
> Show current details only
> Show current and previous details only
> Show current and future details only

If you select 'Show current details only', the User will not be asked to enter a date when they open the Organisation Structure, and will be presented with a view of the Organisation Structure as at today. No previous or future Department details will be shown.

The other options will still ask for a date when opening the Organisation Structure window, but the bottom two options will be restricted so that you cannot select a date outside of that criteria, e.g. if you select 'Show current and previous details only', you will not be able to select a date after today.

Reporting Details

A new heading is now available in the list of person windows, below Manage Job, called Reporting Details. This will have options below it, as follows:

These five options will show you different views of the reporting details for this person, as follows:

- If this person is a Manager or Authoriser, Current Reportees will show a list of people who currently report to that person
- The Managers window will show a history of who has managed that person – this will be a full history, including previous managers, and future changes that are not effective yet. The latest entries will appear at the top of the list, so that you will see the current and future entries straight away, without having to scroll down the list. You can also enter temporary Manager Overrides for this person via this window.
- The Authorisers window will show a full history of who has authorised that person, as per the Managers window
- If this person is, or has been/will be, a Manager, the Departments Managed window will show a history of the Departments that this person has managed. When you open the window, it will default to only showing the Departments that this person is currently managing, but you will be able to tick the Previous or Future boxes at the top of the window if you would like to see previous or future entries in the list
- The Departments Authorised window is the same as Departments Managed, except for Departments where the person was the Authoriser rather than the Manager
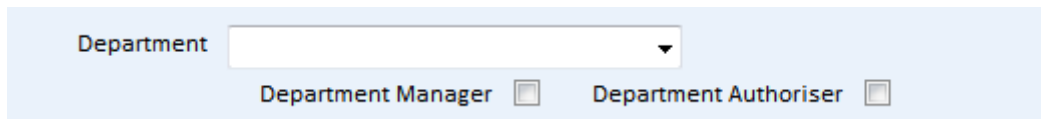
These windows will also show whether the entry is due to an Override or not, either at Department level or Person level.

The Reporting Details information is also available in List All, under a new heading of Reporting Details.

These windows replace the existing Reporting Details section of the Job Details window, which will no longer appear.

Managers and Authorisers

After you have created your Organisation Structure, you will be able to define Managers and Authorisers for Departments. This can be done via the Organisation Structure window, but can also be done at person level, both when creating a new person, and on the Job Details window. Two new options have been added to both windows, as shown below:

On the Job Details window, these options will only appear for entries that are dated on or after the date that you specify as your Management Structure Start Date. This is explained in more detail in the document mentioned in page 3 of these Release Notes.

These options will let you tick when someone becomes the Manager or Authoriser of their own Department. If someone is already the Manager or Authoriser of their own Department, and you want them to be the Manager/Authoriser of other Departments, then this must be done via the Organisation Structure window.

If you tick either of these options, and a Manager/Authoriser already exists for that the specified timeframe, you will be told that you must remove the Manager/Authoriser from the Department first – this can be done by either un-ticking the Manager/Authoriser option on Job Details for that person, or via the Organisation Structure.

These options on New Person and Job Details will update the details for the appropriate Department on the Organisation Structure, and changes made to the Manager and Authoriser details on the Organisation Structure will be transferred back to Job Details, i.e. DART will make sure that the two are kept in line.

These options will update the Reporting Details of anyone who is affected by the change, which will then also update the access for all Dynamic Users who are affected. This will be done immediately as soon as you save the change, so you may find that the ticking, or un-ticking, of these options may take a little longer to save than before, depending on how many people and Users are affected by the change.

As soon as the save has finished, Users who are currently logged in will see the results immediately, e.g. a Manager will see new reportees, and people who have just joined their Department, as soon as the change is made in DART.

Note: Dynamic Users will only see people that they are currently entitled to see. If you enter a new starter with a future date, or transfer someone into a Department at a future date, the appropriate User will not see that person until that date becomes effective.
You may decide that you only want the person who maintains your Organisation Structure to have the ability to define Managers and Authorisers, in which case you would want to hide, or disable (make 'read-only'), these options on New Person and Job Details, for other Users.

This can be achieved in Security, via the Windows section of the Security Profile. To hide or disable the options on the New Person window, the option is below the New option, as shown below:
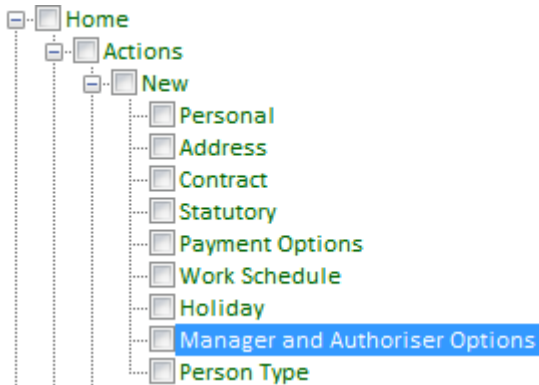
If you specify this as Full Access, the options will appear on New Person. Any other access level will mean that the options do not appear.

To do the same for Job Details, the option is as follows:
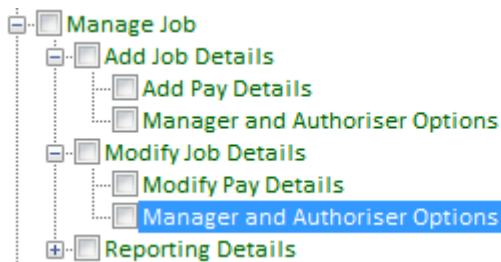
The option shown highlighted above applies for when modifying an existing Job Details entry, so you would need to give the appropriate access level to the option shown, and the one below Add Job Details as well.

If you specify these as No Access, the options will not appear at all. If you specify them as Read Only, the options will appear, to show whether someone is a Manager or Authoriser, but the user will not be able to change the options.

Board Members

In order for someone to manage or authorise a Department other than their own Department, they must be the Manager and/or Authoriser of their own Department. If someone is a Manager of their own Department, they will be allowed to be a Manager or Authoriser of any other Department. If someone is the Authoriser of their own Department, but not the Manager, they will be allowed to be the Authoriser of any other Department.
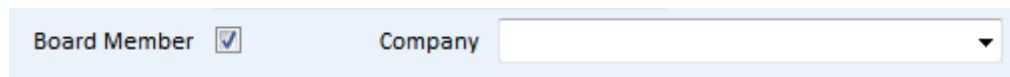
Another option of 'Board Member' exists, which lets you bypass these rules for certain people who can manage or authorise any Department, without having to be the Manager or Authoriser of their own Department. We would expect this to be people who are very high up in your organisation, e.g. Directors or Board Members, hence the reason for calling this option 'Board Members'.

For example, you may have a group of Directors who are all in the same Department within your Organisation Structure, of which none of them are actually the Manager of that Department. However, you still want them to be able to manage and/or authorise other Departments, so for these people you would select the 'Board Member' option. This appears on the New Person and Job Details windows, as shown below:

If you have more than one Company, when you tick this box, you will be able to select the Company of which that person is a Board Member, as shown below:

Board Members will not have a Manager or an Authoriser generated by DART, so you will need to specify their Manager and Authoriser manually via the Managers and Authorisers options below Manage Job, as a Person Level Override.

Because of this, we would recommend that you only use the Board Member option for genuine board members, rather than just as a way of bypassing the rule that requires someone to be the Manager/Authoriser of their own Department before they can be the Manager/Authoriser of other Departments.

Configuration Audit

We have now expanded the Audit functionality within DART so that changes that you make to data other than person related information will also be audited. Currently, only changes to person related data is audited.

This means that any changes that you make to information on the Employer Configuration, Setup and Administration menus will be audited, as well as changes to Alert definitions and the options on the Payroll Extract window.

The existing View Audit option on the Reports menu has been split into two, as shown below:
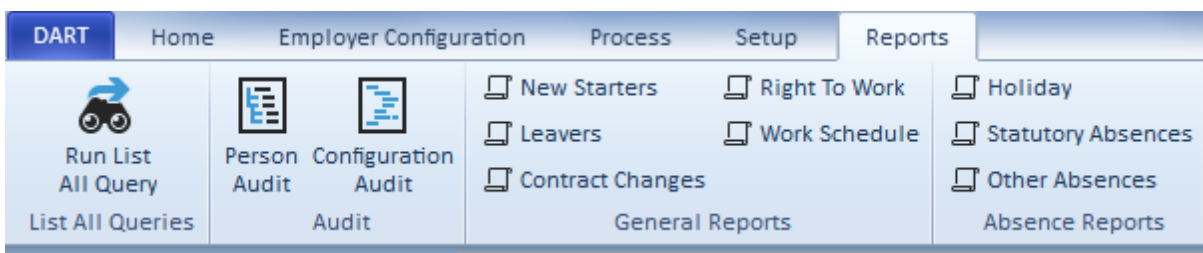
The 'Person Audit' option replaces the existing 'View Audit' option – this will continue to show changes to person related information.

The new 'Configuration Audit' option will show you the changes that have been made to non-person related information. It will work in the same way as the Person Audit window, except that the choices on the left hand side of the Filter window will let you choose from the configuration menu options instead of the person windows, as shown in the example below:
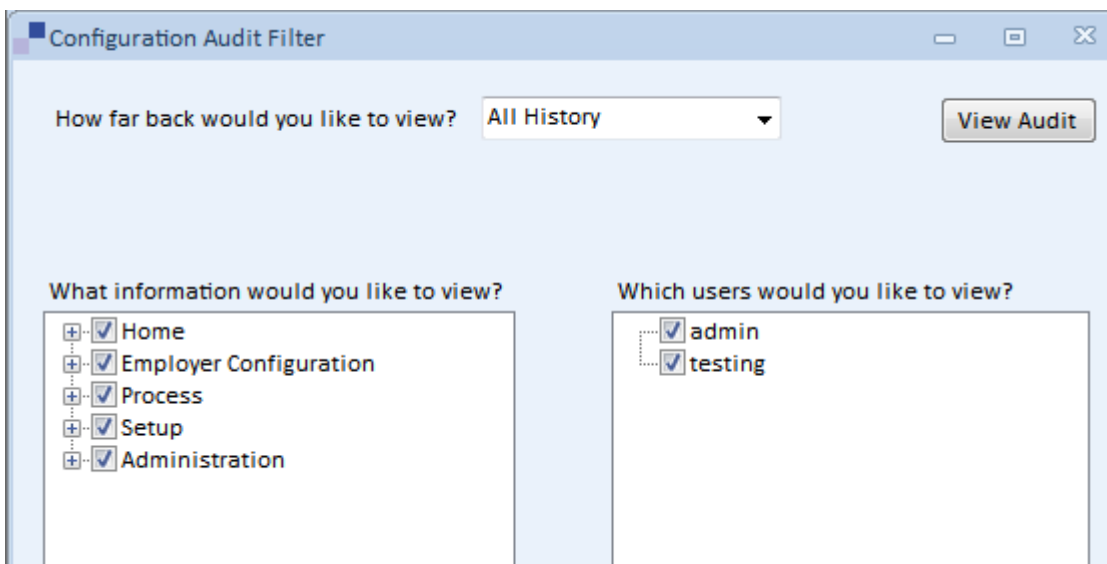
The options on the left can be expanded to show the sub-menus below each one. Once you have defined your filter, you can click on View Audit to view the details, in the same way that you currently view your person related audit details.

Benefits and Allowances

DART now has the ability to create Benefits and Allowances, and to assign these to your employees.

Creating Benefits and Allowances

Two new options have been added to the Setup menu, as shown below:
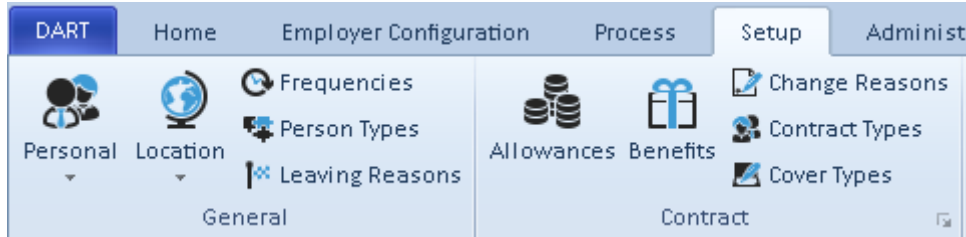
Clicking on the Allowances window will open a new window, from which you can create and maintain Allowances within DART. An example is as follows:

You do not have to specify a Start Date, but if you do, you will not be able to attach the Allowance to anyone prior to that date.

The End Date will let you specify that an Allowance is no longer available. You will not be able to attach that Allowance to anyone after that date.

Cover Type will let you denote the type of cover associated with that particular Allowance. We have provided an initial list, as follows:
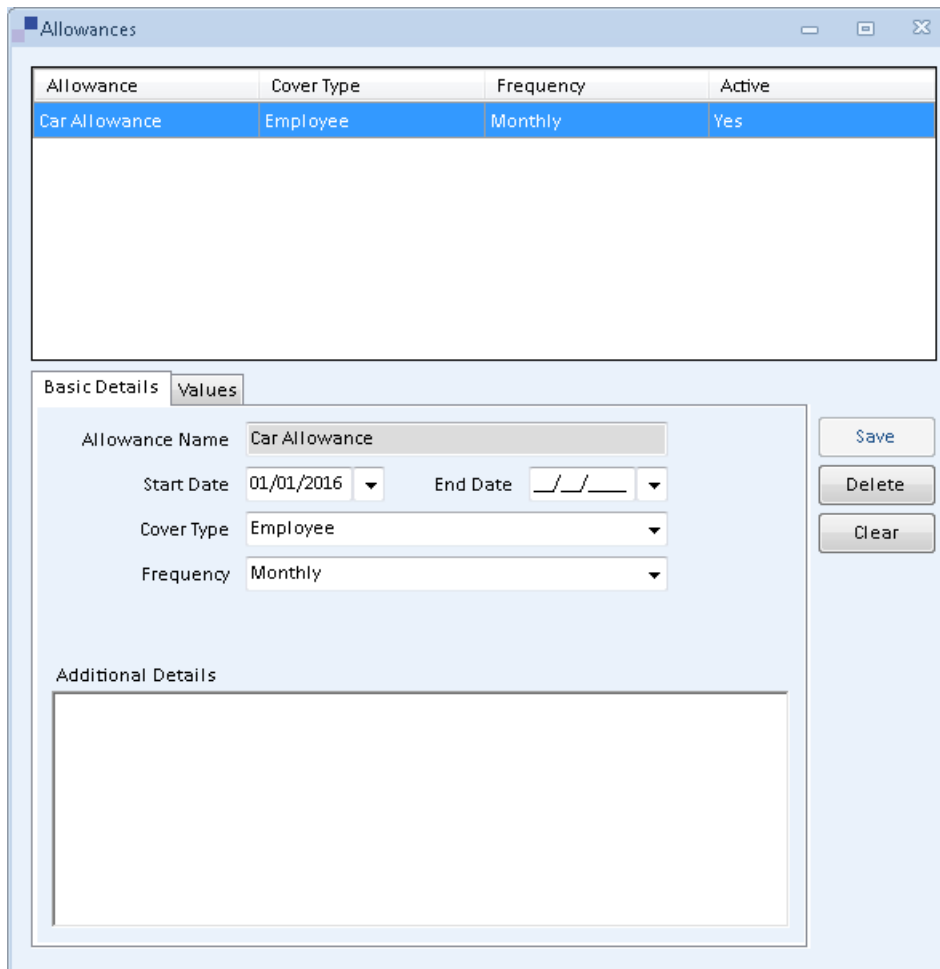
> All
> Employee
> Employee & Family
> Employee & Partner
> Entitled
> Family
> Other

This list can be maintained via a new option on the Setup window, called Cover Types – this can be found in the same section of the Setup menu (Contract) as the Allowances and Benefits buttons. If you do not want to use any of the predefined values listed above, you can delete them all and create your own Cover Types, but remember that once you start using a Cover Type, you will no longer be able to delete it.

The list of Frequencies will be taken from the existing list of Frequencies that are available on the Payment Options section of the New Person and Basic Details windows. You can add to this list via the existing Frequencies option on the Setup window (in the General section), but remember that any changes that you make to the list of Frequencies will apply to the Benefits, Allowances, New Person and Basic Details person windows.

You can add any additional information for the Allowance to the Additional Details field.

The Benefit Setup window will have the same fields as explained above, but with the following additional options:
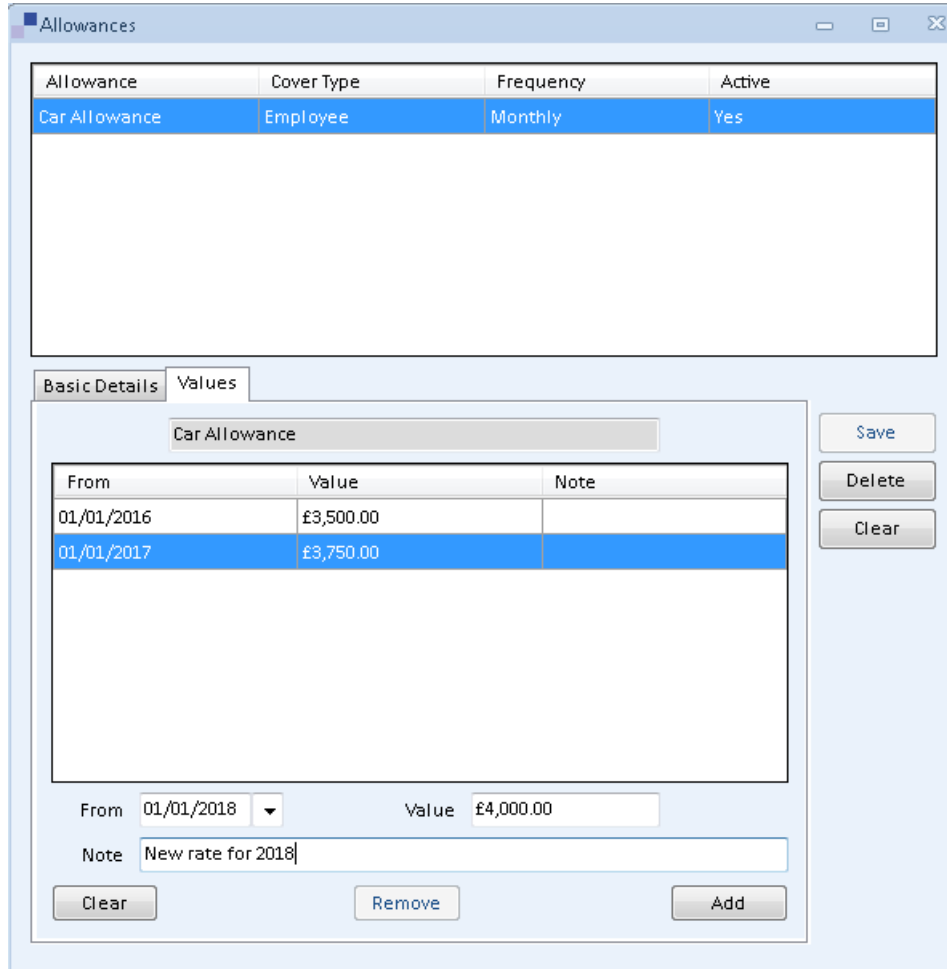
> Flexible Benefit
> P11D

These will be tick-boxes that will let you define whether the Benefit is flexible or not, and whether it is to appear on the P11D.

Note: once an Allowance is in use, i.e. you have attached it to at least one person, you will not be able to change the Cover Type or Frequency (or the Flexible/P11D options for Benefits), so it is important that you make sure that these are set correctly before starting to use the Allowance or Benefit. You will still be able to change the Start Date, End Date and Additional Details.

Benefit and Allowance Values

You will be able to keep a history of values associated with each Benefit and Allowance, by clicking the Values heading on the window, as shown below:

In this particular example, the Car Allowance has a history of values for January 2016 and 2017, and a new value for January 2018 is currently being input. Clicking the Add button will add the 2018 value to the list. You can change, remove or delete values from this list, when necessary.

Each value will be effective from the From date up to the day before the From date of the next value. In the example shown above, this means that the value from 1st January 2016 to 31st December 2016 is £3,500, and that the value from 1st January 2017 onwards is £3,750. Once the 2018 entry is added, the value of £3,750 will only be effective until 31st December 2017, and the value of £4,000 will be effective from 1st January 2018 onwards.
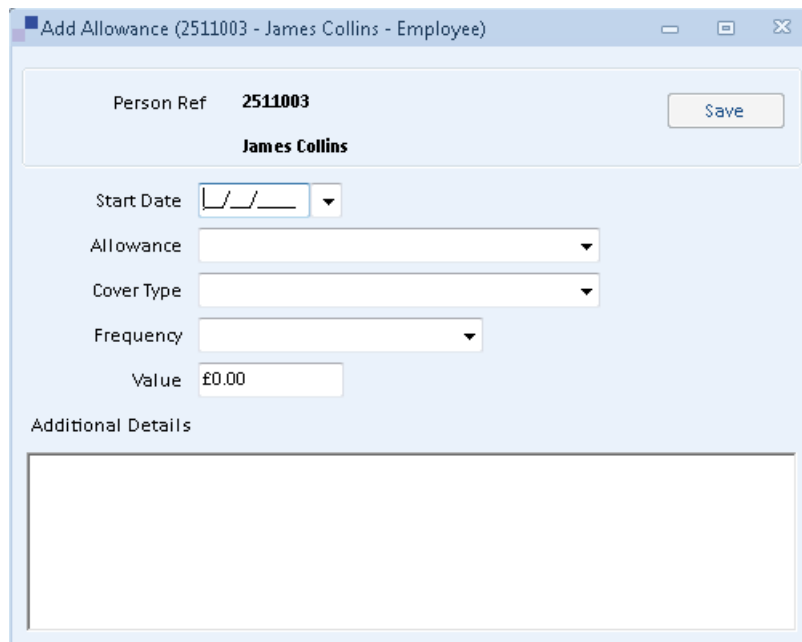
Note: changes that you make to the Values will not be saved to DART until you click the Save button.

Attaching Benefits and Allowances to people

Two new options have been added to the list of person windows on the left hand side of DART, called Manage Allowances and Manage Benefits. These have the usual Add and Modify options, to add new Benefits/Allowances or modify existing ones.

This example shows how to add an Allowance, but Benefits work in exactly the same way.

To add an Allowance to someone, click the Add Allowance option, and the following window will appear:

You must specify the date that this person started this Allowance, in the Start Date field.

Once you have entered the Start Date, the Allowance list will show a list of Allowances that are effective at that date. Therefore, if you have any old Allowances that have End Dates in the past, these will no longer appear in the list once you move past that date. If you click on the Allowance field before you enter a Start Date, you will see a list of Allowances that are effective today.
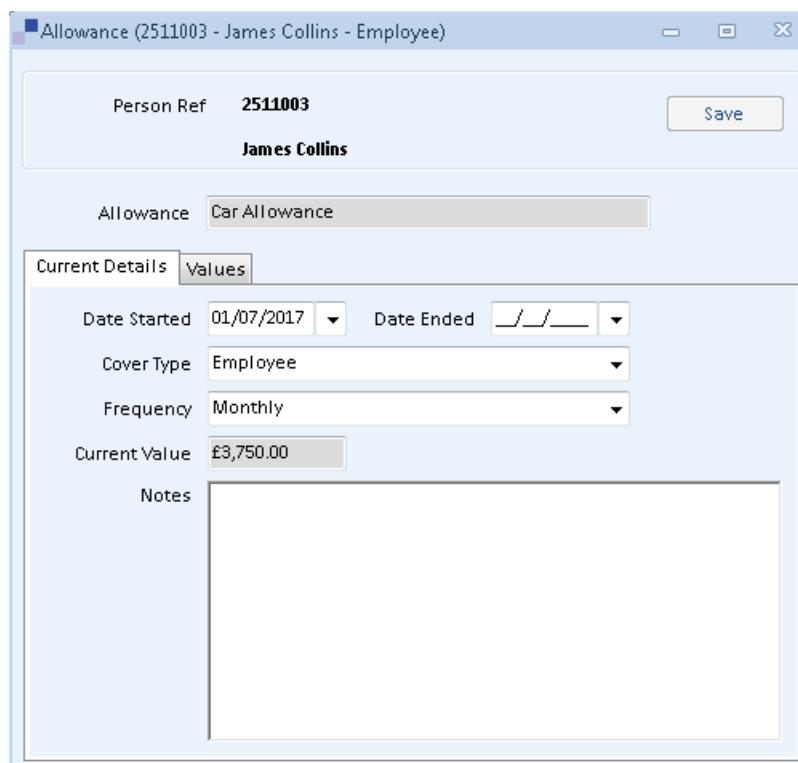
Once you have selected an Allowance, the Cover Type, Frequency and Value fields will default for you, based on the definition of that Allowance. You can change these, if you wish, but we would imagine that in most cases, you would want to keep the default values. You can enter additional details that are specific to this particular person in the Additional Details box, if applicable.

The Value that appears here will be the value that is effective at the Start Date that you input. Using the Car Allowance value from the previous page, if you entered a Start Date of 01/11/2017 the Value would appear as £3,750. If you entered a Start Date of 01/11/2016, the Value would appear as £3,500. This is the initial value for the Allowance as at the Start Date, but all values that are effective from the Start Date will be transferred across to the Allowance for this person.

If, when adding an Allowance to someone, you change the default value, this means that you are effectively overriding the defaults for the Allowance, and any later values after the start date that you entered will NOT be brought across to the person's record. A message will be output advising you of this, and you will be asked if you wish to continue, at which point you can cancel the save, and correct the value, if you have changed it accidentally.

If you keep the default value as it is when attaching an Allowance, then any further values that you add to the definition of that Allowance will be transferred across to the person's record automatically. This means that you can add new values to an Allowance each year, and DART will transfer that value to everyone who has that Allowance attached, providing the current value for that person matches the existing value, i.e. you have not overridden the value at person level.

Once you have successfully added the Allowance to someone, it will appear in the list below Modify Allowance. You can then click on this entry to view or amend the details, which will present you with the following window:

If you wish to remove an Allowance from someone, you can do so by right-clicking on the Allowance under Modify Allowance, and selecting 'Delete this entry'.

Note: As mentioned previously, the same rules apply for Benefits.

Ending entitlement to an Allowance/Benefit or adding future entries

There may be occasions when someone is only entitled to a particular Allowance (or Benefit) for a certain period of time, in which case you would need to enter an End Date to that person's record. You can do this by selecting the appropriate Allowance from the list below Modify Allowance (see the example on the previous page), and entering the appropriate value to the End Date field.

If you enter a future End Date, the Allowance on the list will say '(ends on dd/mm/yyyy)' after the name of the Allowance, so that you can easily identify those that will be ending soon.

If you enter an End Date before today, or once an Allowance with a future date becomes 'old', i.e. the End Date is before today, the list of Allowances below Modify Allowance will be sorted into Previous and Current, so that you can differentiate between your current and previous Allowances, as shown in the following example:
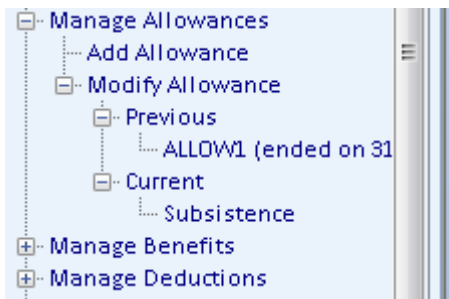
Note: you can hover over ALLOW1 in the list to see the date that the Allowance ended.

If you attach an Allowance or Benefit to someone with a future Start Date, another option will appear below Modify Allowance, called Future – this will contain the Allowances and Benefits that start after today.

The grouping explained above will be done automatically for you when there are previous or future entries. If there are only current entries, there will be no grouping. If you do not like the grouping, and would prefer to see all entries in a single list, in alphabetical order, you can right click on Modify Allowance, and select No Grouping, as shown below:
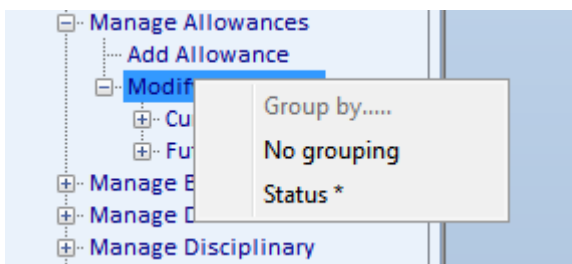
This will remove the Current, Future and Previous headings and present you with a single list. This will apply to all people that you view in DART from that point on, even after you have logged out of DART and back in again, i.e. it is a permanent setting. You can revert back to Grouping again by selecting someone who has previous or future entries, and right clicking on Modify Allowance and selecting the Status option.

Keeping a history of Allowances and Benefits

If somebody loses their entitlement to an Allowance/Benefit, or chooses to end it, you would enter an End Date to that particular entry, as explained on the previous page.

If the Allowance/Benefit subsequently becomes applicable again at a later date, you can add it to the person again, via the Add Allowance/Benefit option and, providing you enter a Start Date that is after the End Date of the previous entry, you will be able to re-attach it to the person from the new Start Date.

This lets you keep a history of when Allowances and Benefits were applicable to each person. As mentioned on the previous page, the Grouping will automatically put the old entry under the Previous heading, and the current entry will appear under the Current heading.

Adding/Amending Allowance and Benefit Values

Once an Allowance/Benefit has been created and attached to people, you will not be able to change the main definition, i.e. the Cover Type and Frequency, but you will be able to make changes to the values for that Allowance/Benefit.
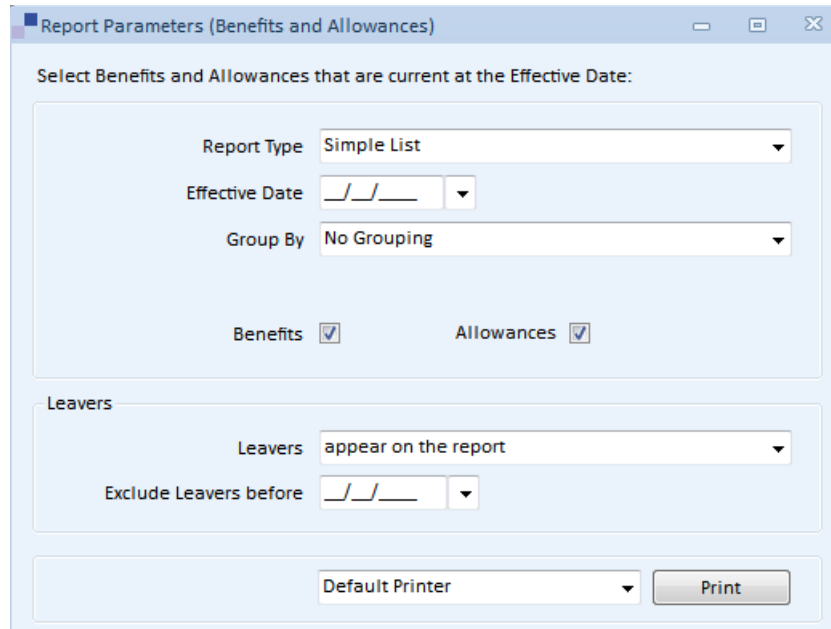
If you add a new value to the Setup of an Allowance, when you click Save DART will tell you how many people have that Allowance attached that will be affected by that change. These will be the people where the default values have been left as they are. If you have changed the values at person level to be different to the default values, then any further changes that you make to the definition of the Allowance will not be passed through to that person.

The same applies when updating the value for an existing date – people who have that Allowance attached with an entry for that date, where the value is the same as the original value for the Allowance before you changed it, then those people will have their Allowance updated to match the new value that you have just entered.

The same is true of the Note that you input for the values. These will also be passed through to people when the Allowance is attached and, providing you do not change the Note at person level, any changes that you make to the Notes will be passed through to the appropriate people.

Benefits and Allowances Report

A new sub-menu has been added to the Reports menu, called Other Reports, which contains a Benefits and Allowances option. When you click this option, the standard Report Parameters window will open, as shown below:

As with most other reports, there are two options:

Simple List
Full Details

Simple List will give you a single line for each person that has an Allowance/Benefit at the Effective Date that you enter, showing the Cover Type, Frequency and current value as at that date.

Full Details will select all Allowances/Benefits that are current at the Effective Date, and will print all the details for each entry, including all values for that entry.
There are two tick-box options that will let you define whether you want to include Benefits and/or Allowances on the report. Each time you run the report, it will default to both, so if you only want one, e.g. Allowances, you will need to un-tick the other, e.g. Benefits in this case. You cannot un-tick both.

Pay Details and Pay Basis changes

The Job Details window contains a section titled Pay Details, which lets you enter the Pay Basis and the amount related to that Basis (which we call Basic Pay), e.g. if you select Annually as the Pay Basis you would enter the annual salary as the Basic Pay. This is existing functionality that has not changed in this version.

This window also shows how the Pay Basis and Basic Pay that you enter affects other pay frequencies, such as Weekly, Monthly, etc. Prior to this version of DART, you had to recalculate the other pay frequencies manually each time you made a change, by clicking the Calculate All button. You could also make changes to the individual pay frequencies.

The general feedback that we have received is that it would be better if DART always maintained these values for you, without you having to remember to click a button to do so, and that there is never really any need for them to be changed. With this in mind, we have removed the Calculate All button, and removed the ability to change the values, and DART will now recalculate the values automatically, each time you change the Pay Basis, Basic Pay or Basic Weekly Hours.

You can still use the Pay Basis window on the Setup menu to denote which Pay Basis values you would like to use in DART, but this window will now contain an additional field to let you define how many decimal places you would like each Pay Basis to hold. As part of the upgrade, we have set these to 4 for Hourly and 2 for all others, as we expect this to be the most likely choice, but you can change these to whichever values you prefer, via the Pay Basis window.

In the Mass Input and Data Import feature, Hourly Rate, Salary, Monthly Pay, Weekly Pay, Fortnightly Pay and Four Weekly Pay have been removed from the Pay Details type. You will still be able to import the Pay Basis, Basic Pay and Basic Weekly Hours, but the other pay frequencies will now be calculated automatically by the Import process.

Cost Centres

We have transferred the Cost Centre from Basic Details to Job Details, which means that you will now be able to keep a history of Cost Centre changes for your employees. You can specify Cost Centres for each Department in your Organisation Structure, which means that when people change Department, the Cost Centre will be updated in Job Details automatically (providing you have not overridden the default value on the Job Details record).

We have removed the Start and End date fields on the Cost Centre setup window, as Cost Centres are generally static items of data that do not really require starting and stopping. If a Cost Centre is no longer valid, you can remove it from your Departments, and it will no longer be attached to people automatically when they move into those Departments, but you will still have the history in Job Details of when people were in those Cost Centres.

Importing Multiple Documents

When you import or attach documents to someone in DART, you will now be able to select more than one document to be attached/imported, using the Shift and CTRL keys, i.e. the same as you would if you were selecting files via any other method.

When you do this, a window will appear, asking you to enter any Expiry Dates or Notes for each document, prior to importing them into DART, as shown in the example below:
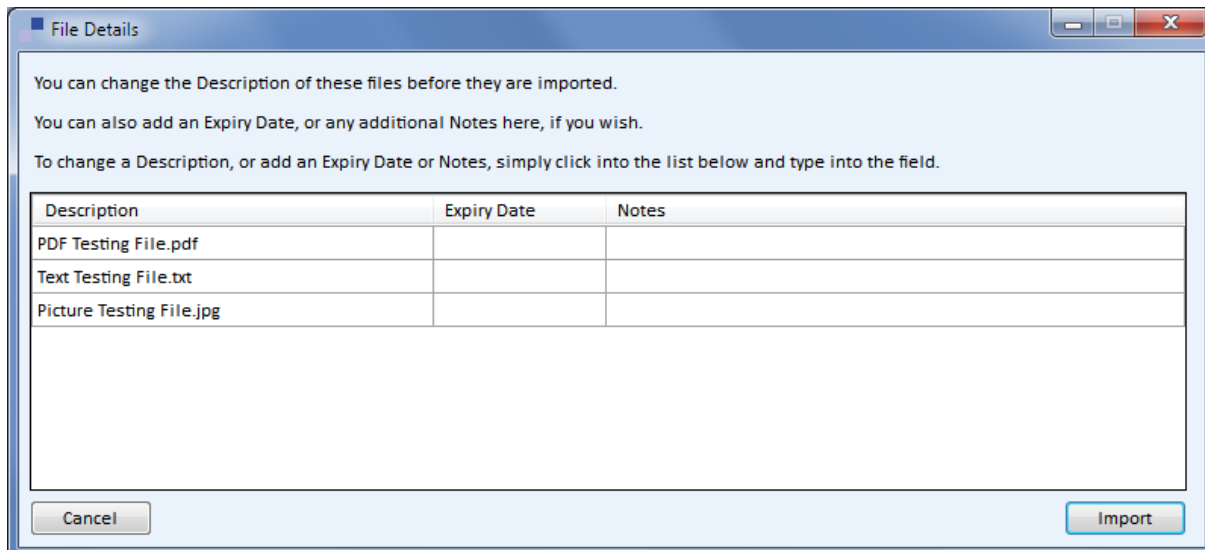
You can now also attach or import documents via the Mass Import and Data Import features. A new type of data of Documents has been added to both, thereby letting you define the following:

> Person ID
> Location
> File Name
> Imported?
> Description
> Expiry Date
> Notes

The Location will be the folder in which the file resides and the file name will be the name of the file, without the folder name, but with the file type at the end. These are not case sensitive, but must be spelt correctly.

If you input Y or Yes to the Imported field, the file will be imported to DART. If you input N or No then it will be attached.

The Description, Expiry Date and Notes are optional.

Exporting to existing Excel spreadsheet

Currently, when you export List All results to Excel, DART generates a new Excel spreadsheet, and populates it with the List All results.

We have now expanded on this, and you now have the option of exporting to a new spreadsheet, or to an existing one. The existing 'Excel' option has been replaced with the following two options:
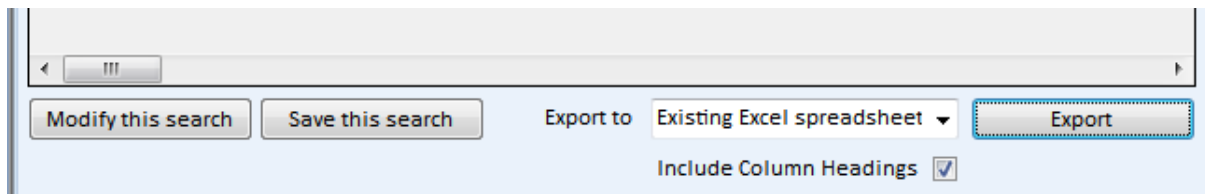
> New Excel spreadsheet
> Existing Excel spreadsheet

If you select either of these, an additional option will appear that will let you specify whether you would like column headings to be output to the spreadsheet, as shown below:

Previously, column headings were always output to the Excel spreadsheet, but if you are exporting to an existing spreadsheet, you may not want this to be the case, hence the ability to un-tick the 'Include Column Headings' option. This option is also available if you are exporting to a new spreadsheet.

When you export to an existing excel spreadsheet, the standard File window will appear, allowing you to locate the appropriate spreadsheet. Only Excel files will be available for selection.

Security on New Person/Basic Details

Currently, if you are able to create new people in DART then you are able to enter all details that appear on the New Person window. This may include sensitive information such as the Statutory and Payment Options that you, as a User, should not be entering.

Likewise, if you have access to the Modify Basic Details window, you can see all information for that person, including Statutory details and Payment Options.

In order to tighten the security on these windows, we have enhanced the security options so that you can now specify different access levels for each section of the window.

This is done via the existing Security Profiles window on the Administration menu, with new sub-headings now appearing below Home/Actions/New and Person Windows/Modify Basic Details.

For New Person, the new options are as follows:
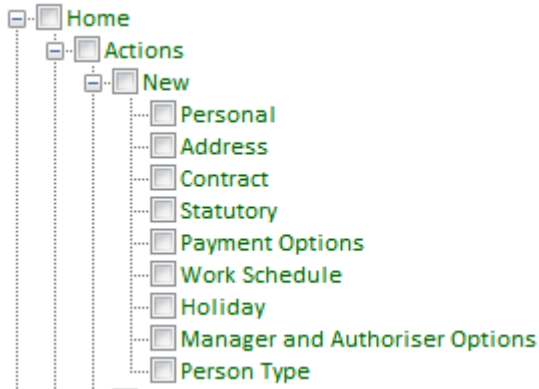
The Personal, Address, Contract, Statutory, Payment Options, Work Schedule and Holiday options relate to each individual section of the New Person window.

After upgrading, all Users who currently have Full Access to the New option will also have Full Access to all of the sub-options shown above. If you wish to remove access to any of these sections, you can do so by changing the access level to No Access for the relevant option.

For example, if you want the User to be able to create new people, but not enter their Statutory or Payment details, you would define the options as follows:
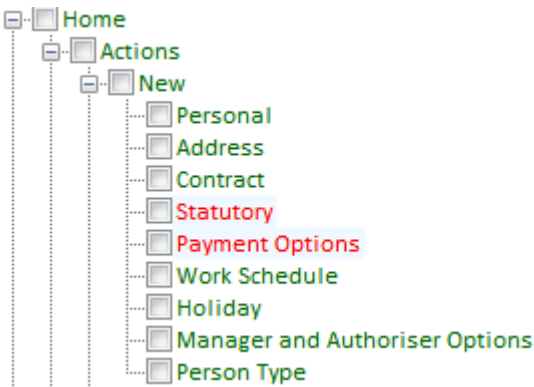
This would mean that the Statutory and Payment Options sections of the New Person window will not appear for Users that have this Profile.

We have also moved NI Number from the Personal section to Statutory, as this is more related to Statutory information than it is to Personal information.

Manager and Authoriser Options relates to the Manager and Authoriser tick-boxes that are now available on the Contract section of the New Person window. If you do not want your User to be able to specify that someone is the Manager or Authoriser of a Department, you can change this option to No Access, and the tick-boxes will not appear.

The Person Type option relates to the Person Type field at the top of the New Person window. This defaults to Employee when creating new people, so if you do not want your Users to be able to change this, then you can set Person Type to No Access.

The new options below Modify Basic Details are as follows:
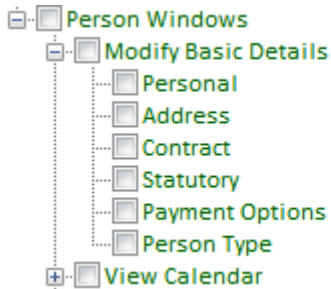
The principle of these is the same as the New option explained on the previous page, although as well as hiding this information completely via the No Access level, you may wish to allow the User to see the details, but not change them, in which case you can set the appropriate section to Read Only.

Note: Manager and Authoriser Options does not appear in this list, as once you have created a new person, these options are available on Job Details, not Modify Basic Details. Therefore, if you wish to hide these options for existing people, or make them read-only, you can do so by setting the appropriate access level to the new option below Job Details, as shown below:
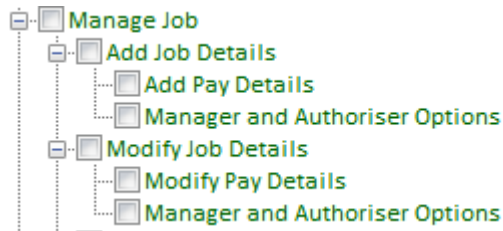
New List All Options

We have added four new conditions to the List All feature, as follows:

Does Not Contain
Does Not Start With
Greater Than Or Equal To
Less Than Or Equal To

Event Date Only option in Security

You may wish for certain Users to know when someone is on holiday, off sick, on a training course, etc, but without giving them access to view everything about that particular holiday, sickness or training record.

This can currently be achieved via the Key People option in Security, which lets you define a list of people that are classed as 'key people' as far as that User is concerned. The User does not have access to these people in DART, so cannot view their details, but when they view the Team Calendar from the Dashboard, any absences, training courses, etc, appear for those people. This gives the User a limited view of those people, so that they can see when they are on holiday, etc.

Key People is existing functionality that will remain in DART, but will only be available to Users who are not Dynamic. Your existing Users will continue to be able to use the Key People as before.

When you start to move your Users to Dynamic Security, you will find that there is far greater flexibility in terms of defining what each User can see for each person. For example, you may want a User to see everyone in their Department, but not be able to see their Absence and Training information. This can be achieved via Dynamic Security, using the existing options available with Security Profiles.

However, you may want to go one step further, and effectively replicate your existing Key People situation, i.e. you want a User to see when someone is on holiday, but not to be able to see anything else related to that absence record. To achieve this, we have added sub-menus below View Calendar in Security, as shown below:
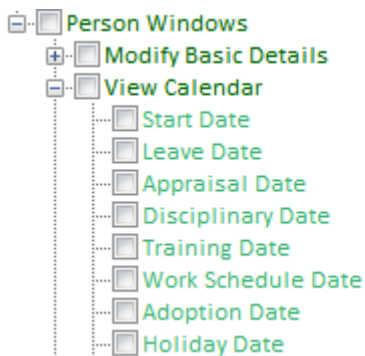
Note: there are more options – the above is just a screenshot of the first few in the list.

Each option below View Calendar represents one of the dates that can appear on the Calendar. If the Profile has access to certain information, e.g. Appraisals, then the corresponding sub-menu beneath View Calendar, in this case Appraisal Date, will be shown in green (note that it is a slightly different shade of green to the windows defined as Full Access).

When you hover over a green sub-menu, you will see that it says 'All Details Available'. This means that the information will appear on the Calendar as normal, and that when you double click that entry on the Calendar, it will open up the appropriate record.

When a sub-menu is green, you have no ability to change it. However, if you were to change the access level for the corresponding menu item to No Access, e.g. if you change Manage Appraisals to No Access, you will see that the colour of the sub-menu changes to a shade of red (again, a slightly different red to the normal No Access colour) and when you hover over that entry, it will say 'No Details Available', as shown in the example below:
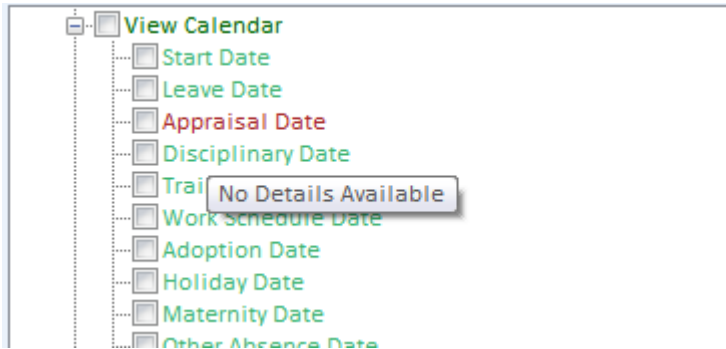
This means that Appraisal information will not appear in DART at all, including on the Calendar. This is the existing situation that applies for No Access at the moment.

However, if you right click on Appraisal Date, you will be presented with the following option:
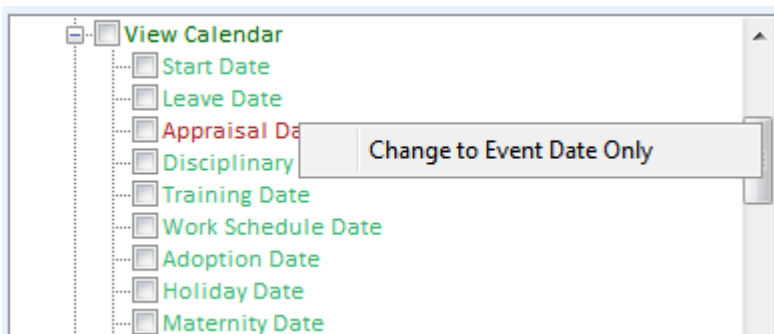
Selecting this option will change the colour of Appraisal Date as follows:
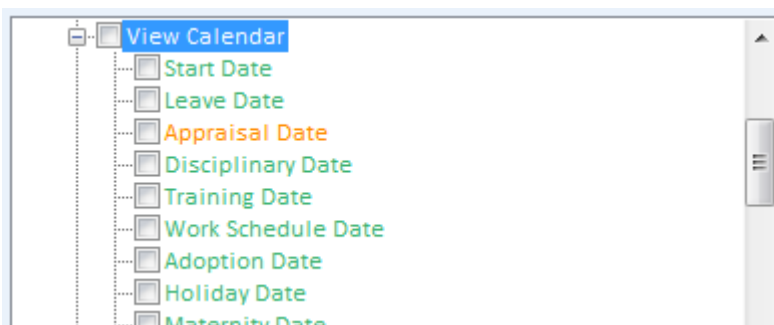
If you hover over Appraisal Date, it will say 'Event Date Only'. This means that Appraisals will appear on the Calendar, but you will not be able to double click on the entry to open the Appraisal. Limited Appraisal information will also be available in List All, so that you can retrieve the date of the Appraisal via List All, but no other details.

Adding Genders to DART

Currently, you are limited to Male or Female as Gender in DART, with no ability to add other Genders. We have now opened this up to allow you to specify as many Genders as required, via a new option on the Setup menu called Gender, which is available from the Personal sub-menu, as shown below:
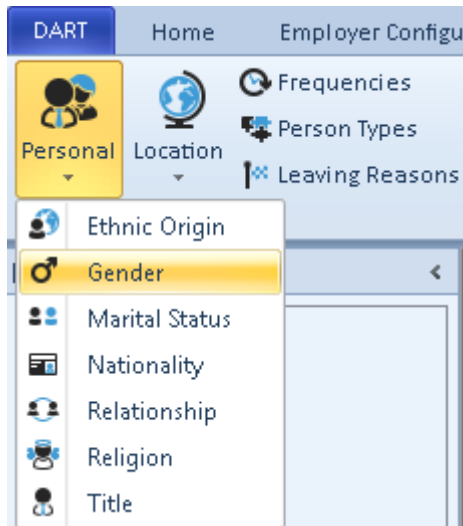
Alerts for People who have Left

Currently, Alerts continue to appear in DART for people who have left. This means that, unless you change the Status to Complete for Alerts when people leave, they will continue to appear in your list of Alerts, and you can end up with a large list of Alerts, many of which are no longer relevant.

We have now changed this so Alerts will no longer appear for people who have left, i.e. their date of leaving is before today. This will happen automatically, without you having to change the Status of the Alert.

When someone leaves, any Alerts that had a Status of Open or In Progress will have their Status changed to Left. If you use the 'Active Alerts only' option in List All for Alerts, these Alerts will not appear in your results, as they are no longer active. If you wish to see Alerts that were still active for someone when they left, you can change the Alerts option in List All to 'All Alerts' which will then include those with a Status of Left.

You can select Alerts in List All that have a Status of Left, but you must remember to change the Alerts option from 'Active Alerts only', otherwise you will not get any results, as Alerts with a Status of Left are not active.

Issues Resolved in this version

P46 Statement missing from Basic Details print   Ref: DART-832

If a new person joins your company, and gives you a P46 Statement instead of a P45 from their previous employer, this can be entered on the New Person and/or Modify Basic Details windows.

However, if you then print the Basic Details, the P46 Statement was not appearing. This has now been resolved, and the P46 Statement will now appear on the print, if present.

DART fails when re-instating a Leaver without a Holiday Scheme   Ref: DART-2345

If you re-instate a Leaver, i.e. remove the Date of Leaving from the Leaver Details window, DART fails if that person does not have a Holiday Scheme attached.

This problem has now been resolved.

This fix was released as a 3.0 patch (3.0.0.1) so if you have already downloaded this version, or a later 3.0 version, then you will already have this fix in place.

Right To Work A2 document should mention National ID Card   Ref: DART-2348

On the Right To Work window, the A2 document for List A is currently called 'EEA/Swiss Passport'.

National ID Cards are also acceptable as A2 documents for EEA/Swiss nationals, so we have changed the name of the A2 document to 'Passport or National ID Card for EEA/Swiss national' to make it clear that this can include a National ID Card or a Passport.

Unable to import Documents when filename greater than 50 characters   Ref: DART-2349

If you try to attach or import a document where the name of the file is more than 50 characters, DART fails with an unexpected error, and the file is not attached/imported. You have to change the name of the file to be less than 50 characters for it to work.

This problem has now been resolved, and you will be able to attach or import any file, without having to worry about how long the name of the file is.

NI Number prefix of KC now accepted   Ref: DART-2351

Over the last year or so, HMRC have been issuing National Insurance Numbers with a prefix of KC, but the current version of DART does not cater for these NI Numbers – any attempt to enter a KC NI Number to DART is currently rejected.

KC has now been added to the list of valid prefixes for NI Number, so you will now be able to enter these to DART successfully.

Left option on Person Search returns people who are leaving   Ref: DART-2414

On the Person Search window, if you select the Left option and click Show All People, you are presented with a list of people with a date of leaving, but this also includes people who are leaving in the future, or today. These people are still current, so also appear when you select Current as the option. The Left option should only return people who have actually left, i.e. their date of leaving is before today.

This has now been resolved – Current will return people who do not have a date of leaving, or where the date of leaving is on or after today, and Left will return people who have a date of leaving before today.

Unable to delete Development Scheme containing quotes   Ref: DART-2420

If you create a Development Scheme that contains a quote character, and then try to delete that Scheme, DART fails with an unexpected error, and you are unable to delete the Scheme.

This has now been resolved, and you will be able to delete Development Schemes containing that contain quotes in the name.

Address Lines 2 and 3 always appear on Audit when Basic Details are changed   Ref: DART-2424

If you make a change to any of the items on the Modify Basic Details window, you may find that the Audit shows that Address Lines 2 and 3 have changed, even though you did not change them.

This has now been resolved. Any further changes that you make to Basic Details will no longer output Address Lines 2 and 3 to the Audit if they have not changed.

Note: existing entries that are already on the Audit will continue to show Address Lines 2 and 3 changing – this fix will only work for changes made after you upgrade to version 3.1.

DART fails when deleting a Holiday Scheme from someone   Ref: DART-2425

When you delete a Holiday Scheme from someone, DART sometimes fails and will not let you delete the Scheme. This is intermittent, and does not happen every time. When it does occur, logging out of DART and back in, and then trying the delete again normally works.

The problem has now been resolved, so that this failure will no longer occur.

Hourly Input can be changed while Payroll Extract is being run   Ref: DART-2448

When you open the Payroll Extract window, it presents you with a list of Hourly Input that has been entered to DART since you last ran the extract. This is the information that will be included on the file when you perform the extract.

However, while you have the window open, other DART Users are able to open the Hourly Input window and make further changes, which do not then appear on the extract, because the Payroll Extract window has already been opened at that point.

To avoid this, we have added locking to these windows, so that if the Payroll Extract window is open, it will not be possible to open the Hourly Input window, and vice versa, meaning that it will no longer be possible for both windows to be open at the same time.

The Hourly Input option on Mass Input/Data Import will also work in the same way, i.e. it will not be possible to import Hourly Input while the Payroll Extract window is open, and it will not be possible to open the Payroll Extract window while someone has selected Hourly Input on the Mass Input or Data Import feature.

It will also no longer be possible for the Payroll Extract window to be opened more than once.

Payroll Extract fails if apostrophe exists in Extract Location name   Ref: DART-2497

If you have a folder name that contains an apostrophe, and try to use that on the Payroll Extract window, DART fails with an unexpected error.

This has been resolved, and you will now be able to use locations containing apostrophes in the Payroll Extract.

Email Addresses will now be validated to ensure they are in the correct format   Ref: DART-2504

Currently in DART, the Email Address is a free format field that allows any values to be entered. With the introduction of Workflow, it is now more important that these Email Addresses are correct, so we have added validation to the Email Address to check that it is in the correct format. We have used the standard rules for Email Address formats, as follows:

- It must contain the @ character (and only once)
- There must be at least one character before the @ and at least one after it
- The bit after the @ must also contain at least one . character
- Numbers and letters can be used, and certain special characters are also available

If you enter an Email Address that does not conform to these rules, a warning message will be output, advising that it does not look like an Email Address, and you will be asked if you are sure that it is a valid Email Address. If you answer Yes to that question, the Email Address will be saved as it is, even though it does not conform to the rules defined above.

It is important to note that the validation only checks to see if the Email Address adheres to the rules defining Email Address formats. If it does, it does not check to see if it is actually a real Email Address. For example, if you have someone in your company called Dennis Jones with an Email Address of dennis.jones@workemail.com and you enter denis.jones@workemail.com, DART will accept this without any warnings, and the emails will fail to be sent. DART will help you by checking the format of the email address, but it will still be your responsibility to ensure that it is spelt correctly.

Declined Absences appear on the Dashboard   Ref: DART-2512

If you have an absence record, e.g. a Holiday request, that has a status of Declined, it still shows in the list of 'Your Reminders' on the Dashboard.

This has now been resolved – declined absences will no longer appear on the Dashboard.

Expiry Date before Start Date for Training Course   Ref: DART-2514

If you enter an Expiry Date for a Training Course that is before the Start Date, a warning message is output, advising you that this is the case, and asking if you wish to continue. However, regardless of whether you answer Yes or No to the question, you are unable to save the change.

This has now been resolved – you should not be allowed to enter an Expiry Date that is before the Start Date of the Course, so this will now be rejected, instead of being a warning.

Holiday wrong when contract change input without change of hours   Ref: DART-2535

If you have a Part Time employee in a Holiday Scheme that uses the Accrual feature, and you enter a change to Job Details that does not include a change of hours, the Part Time Supplement changes value, even though the hours have not changed. This results in an incorrect overall holiday entitlement for that holiday year.

This has now been resolved – the Part Time Supplement will no longer be recalculated for Job Details changes that do not include a change of hours.

This fix was released as a 3.0 patch (3.0.0.2) so if you have already downloaded this version, or a later 3.0 version, you will already have this fix in place.

Sorting on Action By on Alerts window sorts the Alerts incorrectly   Ref: DART-2537

On the Alerts window, if you click the Action By column, you would expect this to sort the Alerts into the appropriate date order. However, this was not happening, and it was treating the date as though it was a text field, so you ended up with all the Alerts with an Action By of the 1st of the month appearing before Alerts with an Action By of the 2nd of the month, regardless of the month and year associated with those dates.

This has now been corrected, and the Alerts will now be sorted correctly base on the date.

DART fails deleting Holiday Scheme from someone, if no Supplements exist   Ref: DART-2600

If you have a Holiday Scheme that does not have any Supplements associated with it (not even the system ones) and that Scheme is attached to someone who also has an earlier Scheme attached, DART fails if you try to delete the latest Scheme, i.e. the one without any Supplements.

This has now been resolved.

The solution to this problem was also released as a 3.0 patch (3.0.0.3) so if you have downloaded this version, or a later 3.0 version, then you will already have the solution to this issue.

Key Field on Configuration Windows   Ref: DART-2616

Currently, on any of the configuration windows, if you select an entry from the list, the key field on the window remains available for input. For example, if you are on the Training Courses window, and select a Course from the list, the Course Name remains available for input.

You cannot change the name of configuration data items once you have created them, so leaving the field available for input is misleading, as this implies that it can be changed. If you did start to type into the key field, you would actually be creating a new entry, and not updating the one that you have just selected.

Therefore, DART will now disable the key field on all configuration windows when you select an entry from the list. This means that any changes that you make will only be for the selected entry, and you will not end up accidentally creating a new entry instead.

DART fails doing List All people with a Development Reason Type   Ref: DART-2641

On the Reasons window below the Development menu on Setup, if you right click on the 'Type of Reason' field and select 'List All people with this Type' a List All Error is output, stating that DART has been unable to identify the Selection Criteria for the List All.

This has now been resolved.

Print problems with configuration windows have been resolved   Ref: DART-2651

Print was not working for the following configuration windows:

- Time Off In Lieu Schemes
- View History for Mass Updates
- Training Providers from the Training sub-menu on Setup
- Professional Bodies, Reasons and Schemes from the Development sub-menu on Setup
- File Types and List All Details on the Administration menu

These are now all working correctly.

Unable to import future Holiday Supplements into DART   Ref: DART-2678

If you try to import Holiday Supplements into DART, via the Data Import feature, for a future holiday year, you get an error message saying 'Unable to identify Holiday Scheme' and the Supplements are not imported.

This problem has now been resolved.

Cannot use Development Activity with trailing spaces   Ref: DART-2715

If you create a Development Activity that has a space character at the end, you may encounter problems using it within DART. This won't always be the case, it depends on certain settings on your database as to whether it will work or not.

DART does not expect space characters at the end of Development Activities, so these have been removed and the problem is now resolved, regardless of your database settings.

Read-Only User cannot view Work Schedule details   Ref: DART-2813

If you have a User who has read-only access to Manage Work Schedule, you only get the ability to view the definition of the Work Schedules that are attached to someone, but do not have the ability to view the breakdown, i.e. how many hours the person is working each day.

This has now been resolved. The list of Work Schedules attached to someone will appear below a sub-heading of Work Schedules, and clicking the View Work Schedule option will present you with that person's work schedule, showing the hours worked.

Holiday Supplements disappear if Holiday Scheme attached more than once   Ref: DART-2905

If you have the same Holiday Scheme attached more than once to someone, e.g. somebody was in Scheme1, changed to Scheme2, then back to Scheme 1 again, any Supplements that you attach to the latest occurrence of Scheme1 disappear the next time you open DART.

This is due to a problem in a routine that runs when you open DART, which ensures that any Supplements dated after the end date of the Holiday Scheme are removed. However, in the instance explained above, these should not be removed, as they are attached to the latest occurrence of the Scheme, and not the previous one.

This problem has now been resolved.

This fix was released as a 3.0 patch (3.0.0.3) so if you have already downloaded this version, or a later 3.0 version, then you will already have this fix in place.

List All Basic Details not working for read-only User   Ref: DART-2922

If a read-only User right clicks on View Basic Details and selects 'List All Basic Details for this person', DART fails with an unexpected error.

This has now been resolved.

Duplicate entries appearing on the Contract Changes report   Ref: DART-2931

If you run the Simple List for Contract Changes report, and specify a date range that encompasses more than one Job Details entry for someone, you will get two entries appearing on the report for that person, but the details of both entries will be the same, and will be the same as the first entry.

This has now been fixed – the multiple entries will still appear, but will correctly show the information for each Job Details entry within the specified date range.

Unable to select Training Activity in List All   Ref: DART-2944

On the Selection panel of List All, if you click the Data Item button and select Training/Training Activity/Activity as the data item, when you try to add that to the selection criteria, you get an error message saying 'Please select a valid data item'. Typing 'Training Activity' straight into Data Item field works, so it is only a problem if you select the data item via the Data Item button.

This is because DART was incorrectly setting the Data Item to Training/Training Activity when it should have been Training/Training Activity/Activity.

This has now been fixed, and DART will now set the value in the Data Item field correctly when you select this data item.

Contract Changes report overlapping bottom of page   **Ref: DART-2948**

When you run Simple List for the Contract Changes report, if there are more entries than can fit on one page, the details are printed right to the bottom of the page, thereby overwriting the page number and date.

This has now been resolved.

Shared Parental option remains selected on Statutory Absences report   Ref: DART-2955

If you click the More Options button for the Statutory Absences report, and de-select Shared Parental in the list of Absence Types, after you have run the report, if you re-open the Statutory Absences window and click More Options again, the Shared Parental option will be selected again. This does not happen with any other Absence Type, which all remember whether you selected, or d-selected, the option.

This has now been fixed, and Shared Parental will work in the same way as the other Absence Types.

Unable to import Training Courses of more than 40 characters   Ref: DART-2958

If you try to import to DART using the Training import type, and the name of the Training Event is more than 40 characters, the import is rejected, saying that the value is too long, even though you can enter up to 100 characters as the Course Name.

This has been fixed, and DART will now let you import Course Names up to the maximum of 100 characters.

Importing Training Activities doesn't work if you leave Units blank   Ref: DART-2964

If you import Training Activities into DART, but leave the Units field blank on the import file, the Import process gives you a warning message for that line, saying that the 'Value for Activity must be numeric'. However, even though this appears to be a Warning, rather than an Error, when you click Save, you remain on Step 5 of the Import process, and the information is not imported.

This has now been fixed – if you leave the Units field blank on the import file, DART will default the value as 0 and will give you a warning saying 'Activity Value assumed to be zero' and you will be able to continue with the import.

DART sometimes fails if changes made while data is being imported   Ref: DART-2967

If one User imports data into DART, via the Data Import process, at the same time as another User updates information for someone in DART, you can end up with a clash, resulting in DART failing with an unexpected error message.

To avoid this, when Save is clicked on the Import window, DART will now prevent any other Users from saving person based information, until the Import has finished. It will still be possible to open person windows, but if you try to save any changes, you will be told that somebody is currently importing information into DART, and will be asked to wait a few moments and try again.

Unable to suspend a User who has left   Ref: DART-2978

If you try to suspend a User for someone who has left, i.e. their date of leaving is before today, an error message is output saying that the selected Person ID is invalid.

This has now been resolved – the list of people on the Users window will now include the person to which that User is attached, even if that person has left.

Unable to import values with £ sign

If you try to import a cash value into DART, e.g. Basic Pay, with a £ sign, e.g. £18000.00, then you may find that it gets rejected as an invalid value. This is not always the case, as it depends on certain settings on your PC (Encoding options) which would have been used when you created the import file. Encoding defines the mapping of each character in a text file, and each country tends to use different Encoding options.

DART has now been amended to cater for the most populate Encoding options used in the UK, which means that the £ sign will now be recognised when used in an import file.

Read Only User has Book Holiday button on Dashboard   Ref: DART-2991

If a DART User has read-only access to their own details, the My Holiday Entitlement section of the Dashboard still contains the Book Holiday button – this should not be there if the User can only read their own information.

This has been resolved – the Book Holiday button will no longer appear for Users who only have read access to their own details.

Can still Attach documents when access restricted to Attach Document   Ref: DART-2994

If you prefer your Users to always import documents to DART, rather than attaching them, you can remove the ability to attach documents by setting the Attach Document option below Manage Documents to No Access in the appropriate Security Profile. This will remove the Attach Document option for those Users, leaving only the Import Document option available.

However, if the User opens an Appraisal or Disciplinary record, and clicks the Documents button, the Attach button is still available, which means that they still have the ability to attach documents via the Appraisal and Disciplinary windows.

This has now been resolved – the Attach button will no longer appear if Attach Document is set to No Access.

Job Changes Extract outputs dates in wrong format   Ref: DART-3063

When you run the Payroll Extract with 'Extract Job changes' selected, DART generates an Excel spreadsheet, containing the appropriate Job Details changes. However, some of the Effective Date values on the spreadsheet may be transformed to US date format, i.e. MM/DD/YYYY instead of DD/MM/YYYY.

This has now been resolved.

Deleting a DART User removes them from Audit Ref: DART-3086

The View Audit window shows an audit trail of all changes that are made in DART, and which User made that change. However, if you delete a User from DART, all history of changes made by that User disappears from the View Audit window.

This could be viewed as a potential loophole in security that allows someone to create a User, make a change, and then delete that User, thereby losing all evidence of that change having been made.

We have changed the View Audit window so that Users who have been deleted will now still appear, but with (deleted) after their name, so that you can identify those that have been deleted. You will be able to view the audit for these Users, in the same way that you can for any existing User.

This information will appear immediately after upgrading to version 3.1, i.e. it will apply to Users that you have deleted in the past, not just those that are deleted from now on.

If you try to create a new User that already has details in Audit, i.e. you are recreating a User that has previously been deleted, you will be advised that the User has previously been used, and will be asked if you want to continue to recreate it. This is to try and avoid any unnecessary confusion later on, if you employ someone with the same name as someone that you previously employed.

Printing on Users window always prints all Users Ref: DART-3122

When you print on the Users window, you always get a full print of all Users. This has been changed so that if you are currently viewing a User then only that User will be printed. If you want a print of all Users, this can still be achieved by printing when you are not viewing a particular User, i.e. printing as soon as you open the window, or click Clear and then print.

Printing Security Profiles Ref: DART-3188

When you print on the Security Profiles window, you only get a print of the Basic Details for that Profile, without any details of the Window level security.

This has now been amended, so that the full list of Window Level security will also be printed for each Profile.

The print process on this window has also been changed so that if you are currently viewing a Profile and request a print, only that Profile will be printed. If you want to print all Profiles, you can do so by requesting the print when you are not viewing a particular Profile.

Note: due to the number of Windows, each Profile will require at least 6 pages, so if you do print all Profiles, you will get a warning message, advising that this will print at least 6 pages per Profile, and will be given the option of continuing as you are, removing the Window Level security from the print, i.e. to print less pages, or cancelling the print completely.