Overview of DART Version 3.0

Contents

Overview

We are pleased to announce that DART has had a makeover, and now has far clearer and more consistent looking icons along the top. With this new look comes a new version number – welcome to version 3 of DART!

Along with the new icons come a few other changes to the appearance of DART:

- A new 'DART Options' button will let you change the theme of DART, like you can with your Office products such as Word and Excel

- The existing HR, Payroll and Training Setup menus have been joined together into a single Setup menu

- DART will now also work with different screen resolutions, so if you prefer to use the 'Larger' option for your Windows settings, DART will now take this into account, and present you with larger text and input fields

The following enhancements have also been made to DART:

- Prompts have been added to List All functionality

- You can now hide Salary details for Manage Job

- A new field has been added to allow the date of the next pay review to be input

- DART users who only have access to certain people will now be able to see the holiday details for people outside their remit, via the new Key People feature

Several enhancements have been made to Holiday functionality in DART, as follows:

- A new Holiday Supplement Type is now available that will allow additional days to be added automatically when reaching a certain length of service
- You can now specify whether you want your Holiday Supplements to impact on the pro-rating of the Holiday Entitlement or not
- It is now possible to specify which Holiday Supplements are available to each Holiday Scheme
- The person Holiday Scheme window will now show the start and end dates of Supplements, and a breakdown of the Part Time supplement
- You will now be able to attach Supplements to people further in the future – currently you can only attach Supplements to the next holiday year for that person
- End Date has been added to the List All data items for Holiday Supplements

The new look DART

The first thing you will notice when you open version 3 of DART is that the icons along the top are all different to how they were before. Prior to this version, the icons were mix of colours, and some were not quite as clear as others. We have now streamlined the icons, making them all the same colour (black and blue) and clearer than before. A sneak preview is shown below:
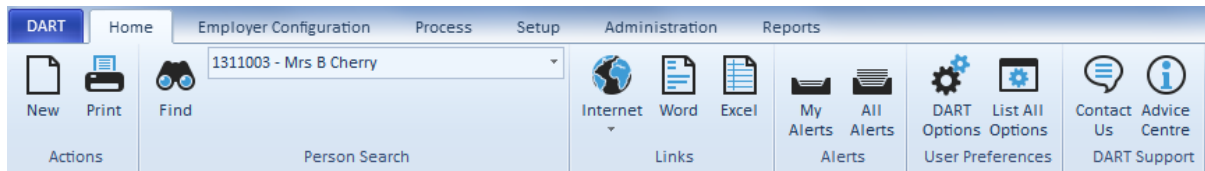

You may also notice a couple of other changes in the screenshot above – firstly, a new option exists, called DART Options, and secondly, there is now only one Setup menu.

DART Options

This new option can be found in the User Preferences area of the Home menu. This will let you change the appearance of DART to match different versions of Microsoft Office. When you first upgrade to version 3, the default will be the Blue theme for Office 2010, as shown in the screenshot above.

However, if you are used to using a different version of Office, and would prefer DART to look similar to that version, you can click the DART Options button and you will be presented with the following:
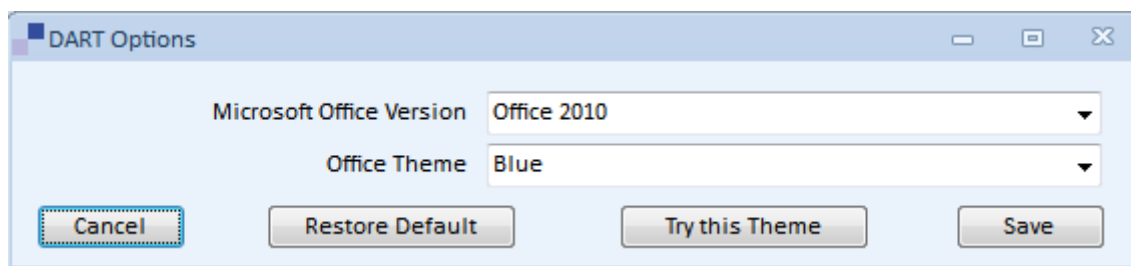
You will be able to choose from Office 2007, Office 2010, Office 2013 and Windows 7 as the Version.

If you select Office 2007 or Office 2010, you will be able to choose from Black, Blue or Silver as the colours. Office 2013 will let you choose from Dark Grey, Light Grey or White. Windows 7 is a default colour, so you will not be able to change the Office Theme for Windows 7.

You can try changing the Version and Theme, and clicking the Try this Theme button to see what it looks like. If you like what you see, you can click Save and this will save these settings for your User, which means that next time you log into DART, it will remember your chosen settings.

If you don't want to change the appearance, then you can click Cancel and DART will revert to how it looked before you opened the DART Options window. You can also restore to the default, i.e. Blue theme for Office 2010 by clicking the Restore Default button.

The Setup menu

Previously, DART had three Setup menus: HR, Payroll and Training. These contained groups of options relevant to each particular area, such as Personal, Location and HR for the HR menu, and Training and Personal Development for the Training menu.

These options have all been amalgamated into a single Setup menu, as shown below:
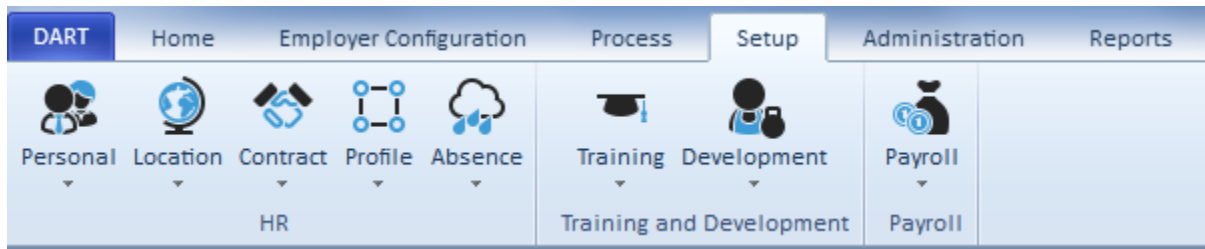
Windows Resolution

Most recent versions of Windows let you change the size of text and other items on your screen to make it easier to read. For example, Windows 7 lets you change from the default of 100% to Medium setting of 125% or Larger of 150%. If you prefer to use these settings, then DART will now take this into account, and will increase the size of the windows accordingly.

Holiday Entitlement

We have made several major changes to the way that holiday entitlement is calculated and shown in DART, as follows:

- A new Holiday Supplement Type of 'Service' is now available that will allow additional days to be added automatically when reaching a certain length of service
- You can now specify whether you want your Holiday Supplements (except Bank Holiday Supplements) to impact on the pro-rating of the Holiday Entitlement or not
- It is now possible to specify which Holiday Supplements are available to each Holiday Scheme
- The person Holiday Scheme window will now show the start and end dates of Supplements, and a breakdown of the Part Time supplement
- You will now be able to attach Supplements to people further in the future – currently you can only attach Supplements to the next holiday year for that person
- End Date has been added to the List All data items for Holiday Supplements

Holiday Supplements

Many companies provide a benefit to their employees, whereby they receive additional holiday entitlement upon reaching a certain length of service within the company. This can currently be achieved in DART by creating a Permanent Holiday Supplement with a Type of 'Other' and attaching it to the relevant employee manually when they reach the appropriate level of service.

However, this additional entitlement is not currently taken into account when the holiday entitlement is pro-rated for part time employees, or when an employee leaves the company.
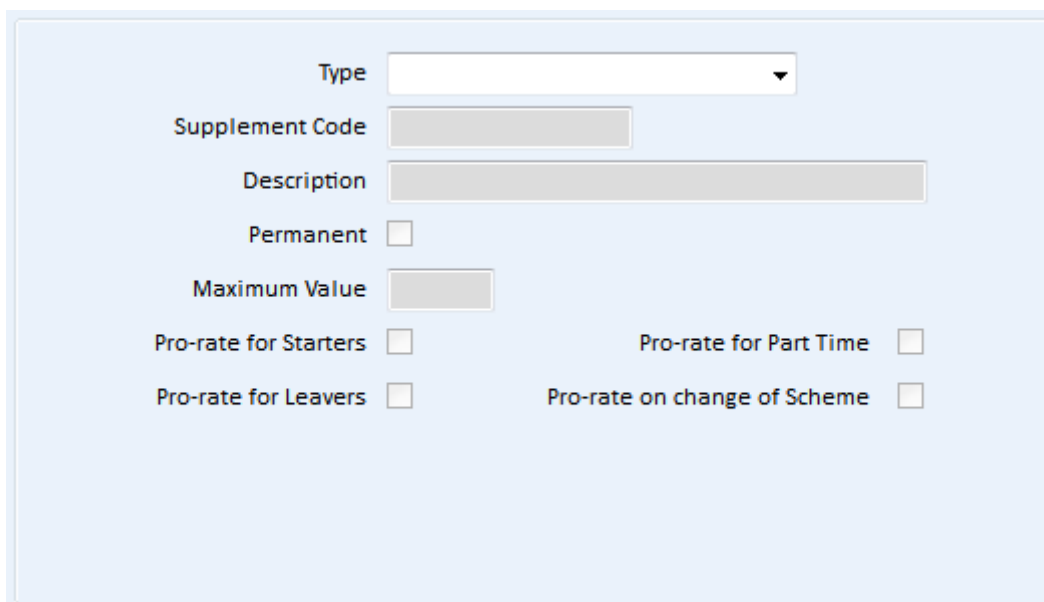
For example, if an employee has a basic entitlement of 20 days with an extra day upon reaching 5 years of service, if that employee leaves, the value shown on the Leaver window in DART only takes the basic 20 days into account, and ignores the extra day. This is also true for new starters, part time employees and for when an employee changes Holiday Scheme.

DART now contains additional functionality that will resolve both of the scenarios explained above.

A new Holiday Supplement Type of 'Service' now exists, that you can use to define the rules for length of service and the additional entitlement, and this Supplement will be attached to the employee automatically when they reach that level of service. This will remove the need for you to monitor length of service and attach the Supplement manually.

You will now also have the ability to specify whether a Supplement is to be included in the pro-rating of holiday entitlement for new starters, leavers, part time employees and changes of holiday scheme. This applies to all Supplements except Bank Holidays.

When you open the Holiday Supplements setup window, you will be presented with the following fields:

The four 'Pro-rate' fields are new. If you tick these options, the value of that Supplement will be included in the appropriate pro-rating calculation.

For example, if you have a part time employee with an FTE of 0.75 and a basic entitlement of 20 days, DART generates a PARTTIME Supplement with a value of -5, i.e. to reduce the entitlement from 20 to 15. This is existing functionality within DART. However, if you added a Supplement with a value of 1 to the employee, the PARTTIME Supplement would remain at -5, thereby resulting in an entitlement of 16, i.e. the pro-rated basic entitlement (15) plus the full value of the Supplement (1).
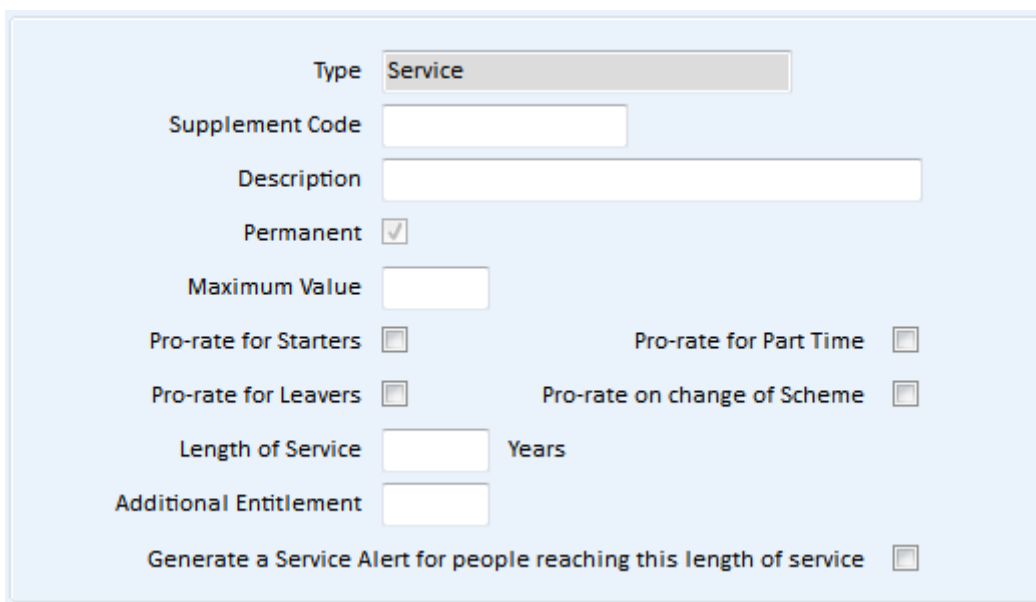
The new 'Pro-rate' options let you state whether you want the value of the Supplement to be included in the pro-rating calculations. Therefore, if you create a Supplement that has the 'Pro-rate for Part Time' option ticked, and attach this to the employee with a value of 1 then DART will change the value of the PARTTIME Supplement to -5.25, i.e. to reduce the entitlement from 21 to 15.75.

Due to the fact that Supplements are not currently included in pro-rata calculations, after upgrading to version 3 of DART, these options will not be ticked for your existing Supplements. Once a Supplement is in use, it is not possible to change its definition, so you will need to create new Supplements if you want them to be included in the pro-rating calculations.

Note: the pro-rating calculations are only performed for Holiday Schemes that have the 'Auto Accrual' option switched on. This is an existing rule within DART that still applies in version 3.

As with the current version of DART, the Permanent option denotes whether the value of that Supplement applies to a single holiday year only, or whether it applies to all holiday years. Examples of Supplements that would not be Permanent are entitlement that is carried over from one year to the next – this would only apply to one holiday year, and would not, therefore, have the Permanent option ticked.

A new Type has been added to the Holiday Supplements set up window, called 'Service'. If you select this option when creating a new Supplement, the following fields will appear:

You will notice first of all that the Permanent box defaults to being ticked for this type of Supplement. This is because additional entitlement based on length of service is always permanent, so DART ensures that all Service Supplements are created as Permanent.

You will also see that there are some additional fields below the 'Pro-rate' fields.

The 'Length of Service' field lets you define the number of years of service that are required in order to acquire the Additional Entitlement.

A year of service will be one full holiday year. DART will not pro-rate the additional entitlement for employees who reach the appropriate length of service part way through a holiday year.

For example, if your holiday year runs from April to March and you have an additional day after 1 year of service, then an employee joining on 1st April 2016 would receive the additional day in the 2017-18 holiday year. This is because the employee would be employed for the entire duration of the 2016-17 holiday year, and would therefore reach a year's service on 1st April 2017.

However, if an employee joined the company on 1st May 2016, the 2016-17 would not then be a full holiday year for that employee. Even though the employee would reach one year's service with the company on 1st May 2017, the additional day would not be added to the employee's entitlement until the 2018-19 holiday year.

This may fit in with the holiday entitlement rules at your company, in which case you will not have any additional actions to carry out if an employee reaches their length of service part-way through a holiday year.

However, your rules may state that the employee receives the additional day straight away, and that this day may be pro-rated based on the date that the length of service falls within the holiday year. If this is the case, DART will not do this for you, and you will need to do this manually, using a non-Permanent Supplement with a Type of 'Other' and attaching it to the relevant holiday year, with the appropriate value, i.e. the pro-rated value calculated manually.

In order to help you identify when this action is required, a new Alert has been added to DART called 'Service' which will be generated when an employee is nearing the length of service for the Supplement. The additional entitlement will still be automatically added to the employee from the start of the next holiday year, and the Alert will tell you that you need to do a one-off addition to their entitlement for the current holiday year.

Using the example on the previous page of the employee who started on 1st May 2016, the Alert would be dated 1st May 2017, and would appear in your Alert list as a Green Alert the appropriate number of days prior to that date. This defaults to 60 days for Green, 30 for Amber and 14 for Red, but you can change these settings via the 'Manage Alerts' button on the Alerts window, if necessary.

If you would like this Alert to be generated, you will need to tick the 'Generate a Service Alert for people reaching this length of service' option for the Supplement (see the screenshot on the previous page).

Prompts in List All

When you create List All reports, you currently need to specify the values to use in your selection criteria, e.g. if you want all Hourly Input between two dates, you need to specify the actual dates in the selection criteria.

If you are just creating a one-off List All, then this isn't a problem, but it is not very helpful if you save your List All reports for re-running at regular intervals. For example, you might have a requirement to list all holiday for employees in a particular Organisation Unit.

In order to make List All even more flexible, we have introduced the ability to specify that the value of your selection criteria is to be input via a prompt when you run the List All. In other words you are leaving the value blank when you create the report, and don't input the value until you actually run the List All.

To specify a prompt, you would enter a value of [Prompt] to the Value field on the List All window, as follows:
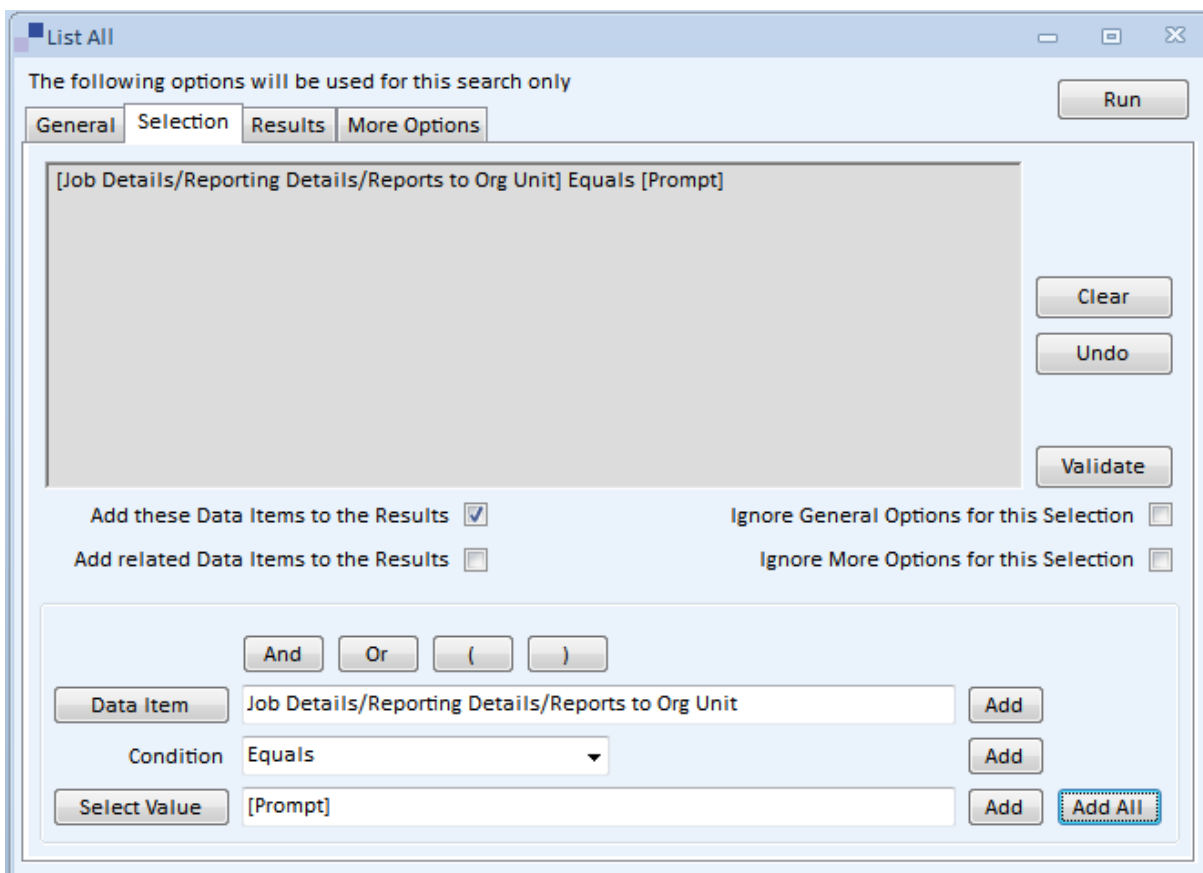
Note: it isn't case sensitive, so you can put [prompt], [Prompt], [PROMPT] or even [PrOmPt]. You can even just enter the word 'prompt' without the '[' and ']' and DART will ask you if you meant to use a prompt, rather than just search for the word 'prompt'.

When you run the List All, you will be asked to enter the value for each Prompt, as follows:
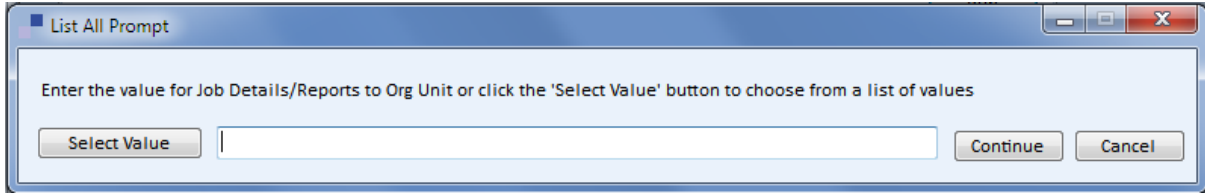

You can either type the value into the field, or click the Select Value button to see the list of values that are currently in use for the people in DART.

Note: it is important to remember that when you save a List All that uses Prompts, you are saving the definition of the List All, and are not saving the values that you input to the Prompts. Each time that you run the List All, you will be asked to enter the value of the Prompts again. This is essentially the point of Prompts, in that you are basically leaving the field blank, and asking for it to be input each time.
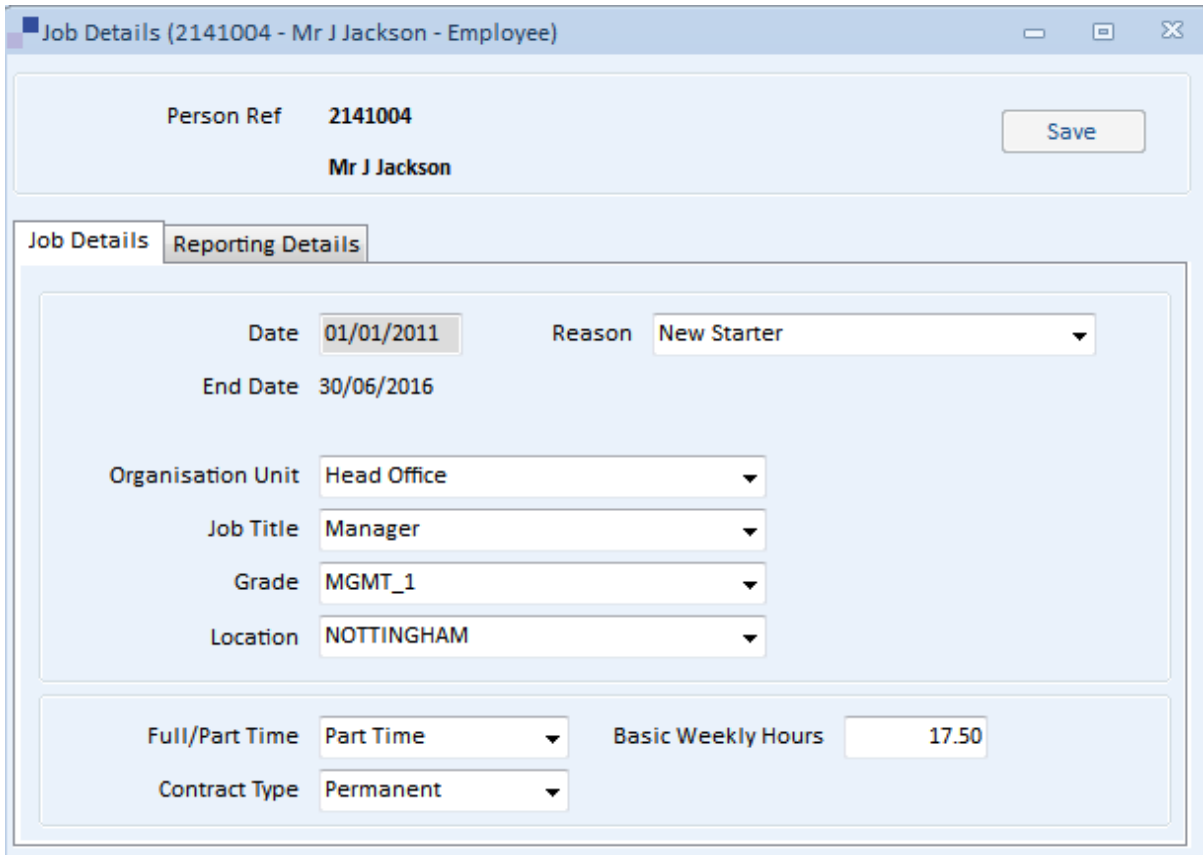
Security for Pay Details

We have been asked recently whether it is possible for a DART user to have access to the Manage Job information, such as Organisation Unit, Job Title, etc, but not be able to see any of the Pay Details. Our answer at the time was 'not at the moment' but we are pleased to announce that this is now possible in version 3 of DART.

On the Window Level section of the Profiles window, new options exist below Manage Job, as shown below:
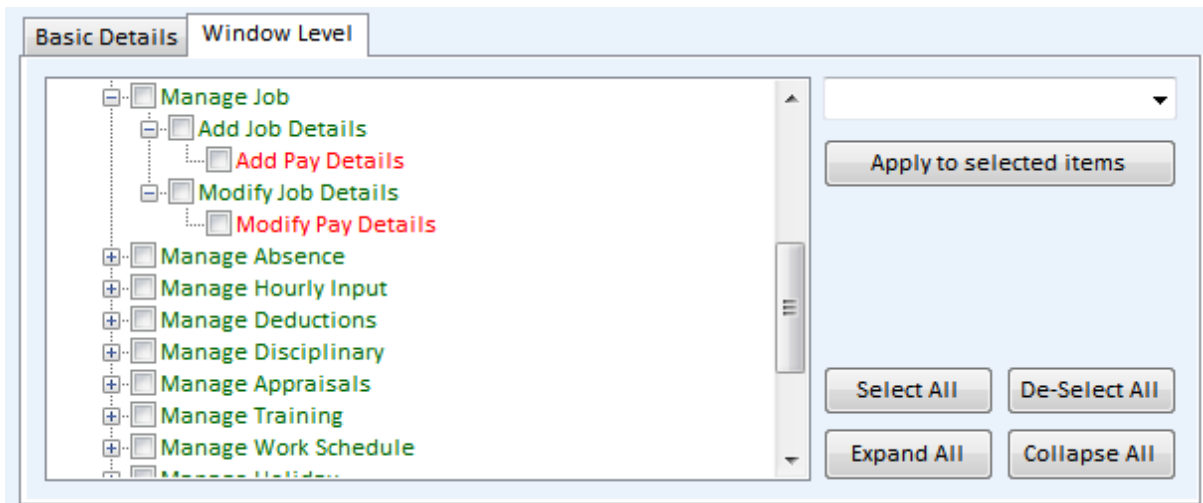
The two new options are 'Add Pay Details' and 'Modify Pay Details' and they are shown in red in this example to show them specified as No Access. When you upgrade to version 3 of DART, these will default to the same access as the level above, i.e. Add Job Details or Modify Job Details.

If you change 'Add Pay Details' or 'Modify Pay Details' to No Access then when you open the Job Details up in DART, you will not see the Pay Details information at all, as shown in the example below:

You will also notice that we have moved the Basic Weekly Hours field from the Pay Details panel onto the Job Details panel. This will ensure that you will still have access to this information, even if you do not have access to the Pay Details.
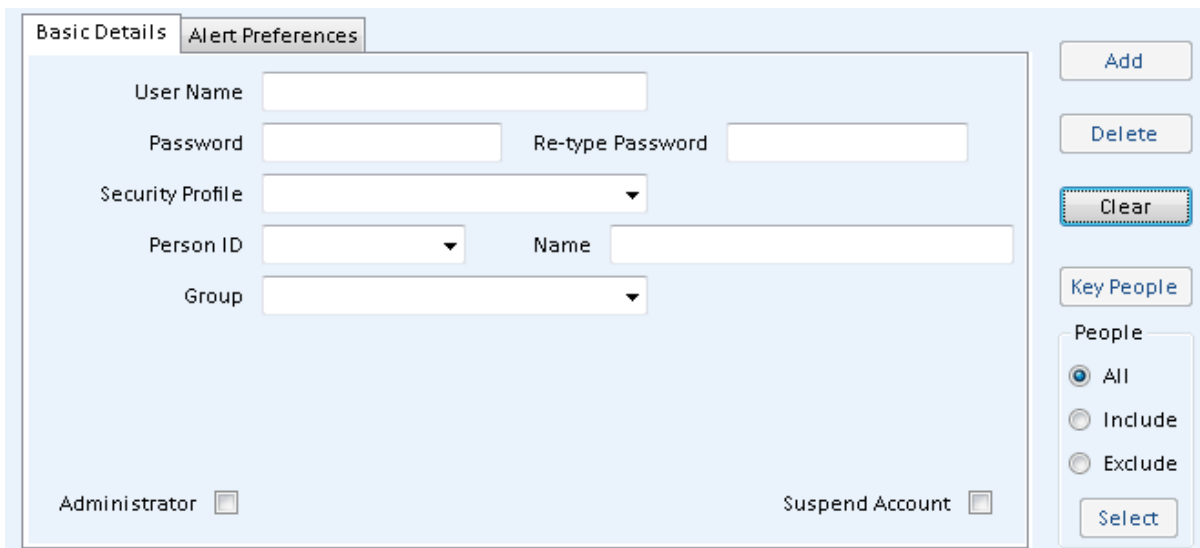
The existing input field for Basic Weekly Hours on the Pay Details panel has been changed to be read-only, and will always default to being the same value as the value on the Job Details panel.

Key People

Within your organisation, you may have managers who each have a DART user, allowing them to only see the people in their own team. However, you may have situations where people in one team cannot be on holiday at the same time as people in other teams. For example, if you have Team A and Team B, the manager of Team A can only see the people in Team A in DART, so would not know if anybody in Team B has booked holiday.

In order to make the holiday authorisation decisions easier for the managers, we have introduced a new feature, called Key People. In the example above, for the manager of Team A, the Key People would be the people in Team B. Using the Key People feature, the manager of Team A will still be able to see the people in Team A as they do now, but will also have the ability to see the when people in Team B have booked holiday.

First of all, let's explain how to define the Key People for a DART user. This is done via the Users option on the Administration menu, which now contains a 'Key People' button, as shown below:

You will not be able to click on the Key People button until you have specified the people that the User can/cannot see. This can be done in one of two ways; by either specifying the 'Group' of people that the User can see, or by selecting the Include or Exclude options under the 'People' heading, and specifying the people that the user can or cannot see.

Once you have done this, the Key People button will become available. Clicking this button will let you define the Key People for that User, as shown in the example on the next page.
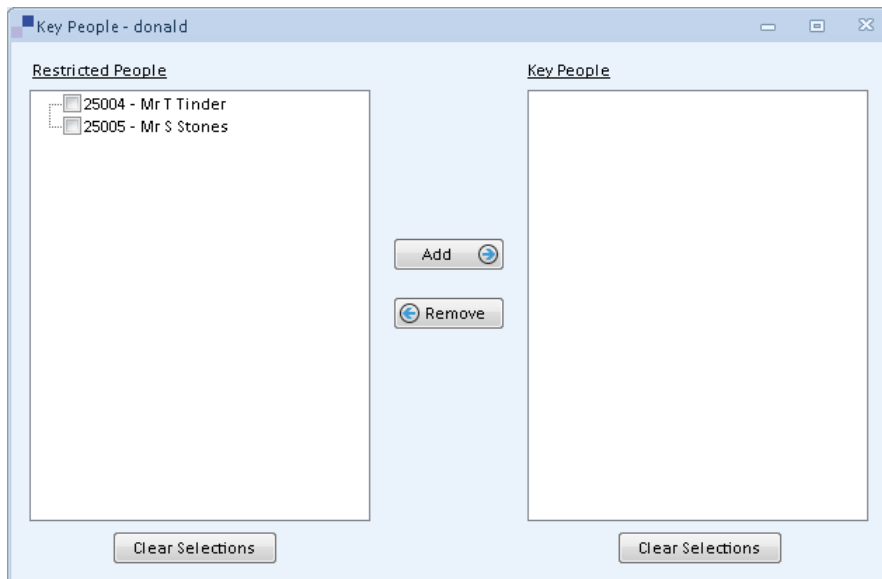
The list of people on the left hand side, i.e. the 'Restricted People' will be a list of people that this User does not have access to.

You can select the appropriate people from this list, by ticking the box for each one, and clicking the Add button – this will then transfer those people over to the list on the right, i.e. the Key People. Once you have done this, you will need to close this window and save the changes for the User, after which the selected Key People will be attached to that User.

When a User has Key People assigned to them, they will be able to see the holiday dates for those people via the Team Calendar option on the DART Dashboard. When you click on the Team Calendar button, the default view will always be to show the people to which that User has access, as shown in the example below:
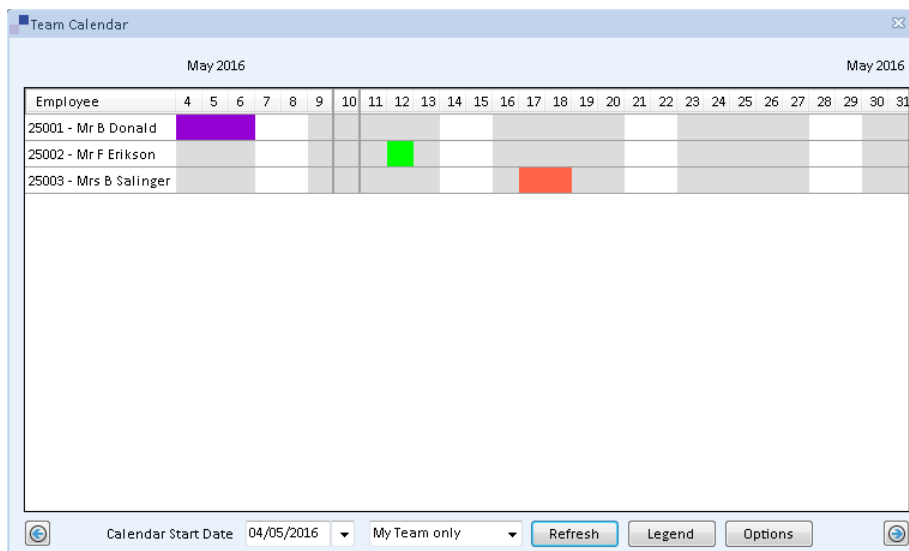
In this particular example, this User has access to three people, one with holiday, one with an appraisal and one with a training course. You will see that a new option exists at the bottom of this window, to the left of the 'Refresh' button. This will default to 'My Team only' each time you open the Team Calendar.

If you wish to see the holiday dates for your Key People, you can change the option to 'Key Holiday only' and click the Refresh button, and the contents of the window will change as shown below:
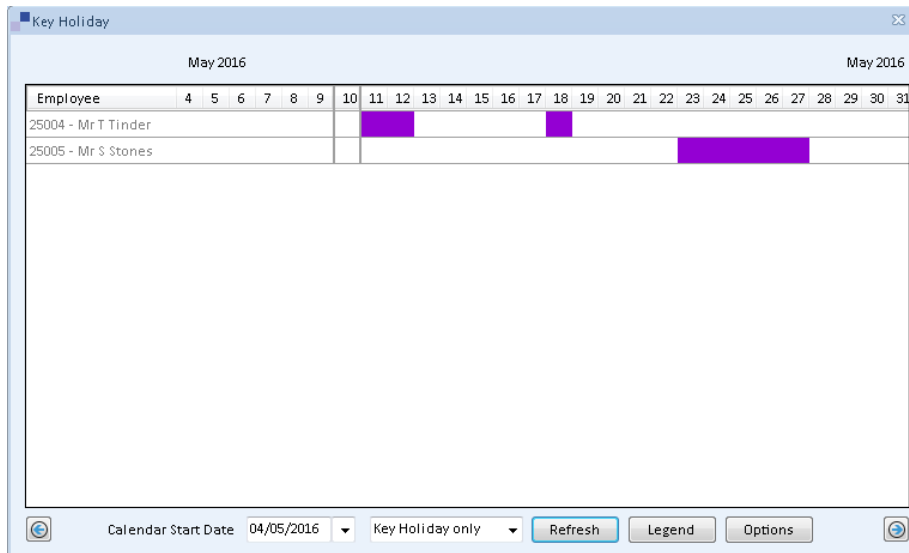
The two people in the example above are the Key People for this User. You will only see holiday details for Key People – you will never see anything else such as appraisals, training, disciplinary, etc. Nor will you be able to double click on the holiday entries to open up the holiday absence for key people.

If you wish to see a combination of the people in your team and the Key People, you can select 'All' as the option, click Refresh, and the window will appear as follows:
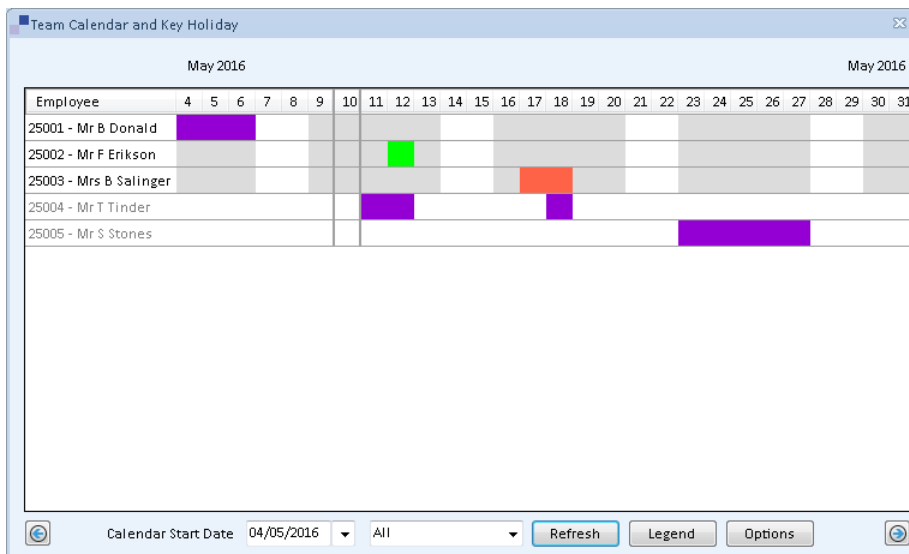
As you can see on the example on the previous page, the Key People appear in grey, to differentiate them from the people in your team.

Note: this new feature provides the ability to view the holiday requests for the Key People. It will still be the manager's responsibility to determine whether a holiday request can be authorised based on that information.

Declined absences will not appear for Key People, even if you have selected the 'Declined' option on the list of Options for the Team Calendar. You will only see holiday requests that have been authorised, or are awaiting authorisation.

Next Pay Review

A new field has been added to the New Person and Manage Job windows, to allow you to specify the date of the next pay review for each person. A new Alert called Pay Review will be generated for that date, to remind you that you have a pay review to process.

It is important to note that the Pay Review Alert will only be based on the latest Job Details entry for each person. This means that each person will only ever have a maximum of one Pay Review Alert. If you remove the value from the Pay Review field for the latest Job Details entry, the Alert will be removed.

The Pay Review Alert is for your information only – there is no action in DART that will automatically remove the Alert. Once you have completed the appropriate actions required for a pay review, you will need to close the Alert manually, by changing the Status to Completed.

Once you have changed the Status to Completed for a Pay Review Alert, it will not be generated again for that particular date, even if you remove the value from the Next Pay Review field and re-input it with the same date.

Entering a different date to the Next Pay Review field for the latest Job Details entry will result in a new Pay Review Alert being generated. If you have not closed the previous Pay Review Alert, it will be updated to reflect the new value of the Next Pay Review field.

If you would like a more detailed overview of this release and an online demonstration then please get in touch with us here at Cirrus!

Via the web: www.cirrusit.com   Via Email: Support@cirrusit.com   Or by phone: 01778 382707

We look forward to hearing from you!