



# Release Notes

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# Copyright and Publication Information

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# New Features

This release contains the following new features.

## Configurable spaces

### New Spaces module to manage crew work spaces in Logs

Under Setup, we added a new module called *Spaces* that allows you to:

- Rename any of the spaces your crew members use in *Logs*.
- Add or delete spaces from *Logs*. The maximum number of spaces you can have is three.

### Increase your maximum number of spaces (beta)

For more information about increasing the maximum number of spaces you can have, please contact your account manager.

## Data transfer and updates for vessel installations

### Disable data transfer to and from vessel installations

You can now disable the transfer of data between a vessel installation and the shore. To disable data transfer, right click the Helm CONNECT icon in the system tray, click **Data Sync** then select **Auto Sync Data**.

### Disable automatic updates for vessel installations

You can now disable automatic updates for vessel installations. To disable automatic updates, right click the Helm CONNECT icon in the system tray, click **Updates** then select **Auto Update**.

### Manually check for updates for vessel installations

You can now manually check for updates for your vessel installations. To check for updates, right click the Helm CONNECT icon in the system tray, click **Updates** then select **Check for Updates**. If an update is available, the system will install it.

# Enhancements

This release contains the following enhancements.

## Platform

This release includes the following enhancements for all our subscribers.

### Use global search for people

You can now use global search (Alt + g) to find people by searching for their first names, last names, middle names, employee numbers, email addresses, or phone numbers. Users must have role-based permission to *Personnel* in order to search for people.

### Email address no longer required for new people

In *Personnel*, when you add a new person, the email address field is now optional instead of required.

### Increased size limit for uploading files

We increased the size limit for uploading files, such as images or documents, from 25 MB to 50 MB.

## Setup

### New users are now active employees by default

In *Users*, when you add a new user, that user will be flagged as an active employee by default. To change this setting, simply clear the **Active Employee** checkbox.

## Maintenance

This release includes the following enhancements for our Maintenance subscribers.

### Inspections and Planned Maintenance

#### All maintenance work flows now in Overview module

All the work flows from the *Inspections* and *Planned Maintenance* modules, such as completing an inspection or maintenance routine, can now be completed in *Overview*, allowing us to phase out the *Inspections* and *Planned Maintenance* modules and remove them from the menu. This simplifies your work flows and ensures you now have a single place to manage and review all the maintenance work for your vessels.

### Onboard

#### View asset details from Onboard

In *Overview*, we added a new Asset Details tab that provides a read-only view of an asset's details, such as its division, asset types, and responsible parties.

#### View components from Onboard

In *Overview*, we added a new Components tab that provides a read-only look at an asset's components, including details such as make, model, and serial number.

#### Allow vessels to assign failed items to shore

If you fail a checklist item from Onboard, you now have the option to assign the item to shore. This feature can be restricted to specific users by using role-based permissions.

### Overview and Onboard

#### Link recurring failed items to existing tasks

If you fail a checklist item that was failed on an earlier instance of the same checklist, you can now link the failed item to an existing task instead of creating a duplicate task for the same failed item.

## Jobs

This release includes the following enhancements for our Jobs subscribers.

## Global search

### Additions to the global search

You can now use the global search (Alt + g) to do the following:

- Find archived orders.
- Search by order number and by transaction number.

## Dispatch

### Reactivate an archived order

On the Trips tab, you can now unarchive or reactivate an order that has been archived. This feature can be restricted to specific users by using role-based permissions.

### Enhancements to the diary

On the Trips tab, we added several enhancements to the diary:

- You can now use a text search to find notes in the diary.
- You can now print notes directly from the diary.
- In addition to diary notes, you now have the option to display, search, and print billing, crew, or dispatch notes in the diary.

## Billing

### Performance improvements to the Overview tab

On the Overview tab, when you scroll down through longer pages, if there is more content to display, it will now load automatically when you reach the bottom of the page, and a message will indicate that more content is loading.

### Performance improvements to the Transactions tab

On the Transactions tab, long lists of content are now divided into pages of 25 items each. You can display other pages by clicking the links for specific page numbers, or by clicking the Prev or Next links.

### Additional columns on the Overview tab

On the Overview tab, you now have three new optional columns: Submitted, Approved, and Transaction Number.



### **Reverse related transactions without reversing the invoice**

You can now reverse related transactions, such as credit notes or commissions, without having to reverse an entire invoice. This feature is optional and can be restricted to specific users by using role-based permissions.

### **Prompt users to enter a reason for reversing a transaction**

You now have the option to require users to enter a reason for reversing a transaction. You can configure these reasons on the Reasons tab in *Orders*, under Setup.

### **Confirm the transactions being emailed**

On the Transactions tab, when you're emailing two or more invoiced or posted transactions, you'll now be prompted to confirm the list of invoices going to each email address, as well as any invoices that can't be sent because they don't have an associated email.

### **Confirm the number of invoices being approved or submitted**

On the Transactions tab, when you're submitting or approving two or more invoices, you'll now be prompted to confirm the number of invoices being approved or submitted.

### **Unique reference numbers for billing rules**

In *Tariffs* and *Contracts*, each billing rule is now assigned a unique reference number when you save it.

## **Setup**

### **Resources now part of the Ships module**

We moved the Resources and Resource Types tabs from *Orders* to *Ships*. This means you can now set up your ships and resources within the same module.

### **Configure reasons for reversing a transaction**

On the Reasons tab in *Orders*, you can now add a list of standard reasons users must choose from when reversing a transaction. If you haven't configured any transaction reversal reasons, users won't be prompted to enter a reason when they reverse a transaction.

### **Unique reference numbers for business rules**

In *Business Rules*, each business rule is now assigned a unique reference number when you save it.

## Reports

### **Transaction filter for revenue allocation reports**

If you build a report for revenue allocation, you can now filter your data by transaction status: Unapproved, Approved, or Submitted.

### **New notes reports**

You can now build a report for any or all of the following types of notes: Billing, Company, Contract, Crew, Diary, Dispatch, or Invoice.

### **Improved scrolling in the filters area**

The scroll bar to the right of the Preview area now extends up to the Filters area.