



Release Notes

Version 1.4

Copyright and Publication Information

Published by:

Helm Operations
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Victoria, BC V8W 3B9
Canada



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May 2017

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Revision: 1

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New Features

This release contains the following new features.

Maintenance

This release includes the following new features for our Maintenance module.

Activity-based maintenance

If your company has purchased Event Logs as well as Maintenance, you can now take advantage of activity-based maintenance. This new feature allows you to configure selected inspections, surveys, or maintenance routines to be automatically added or removed from your assets' To Do lists in Onboard, depending on each asset's logged activity.



Example: If you don't want your crew to take engine readings while an asset is in dry dock, simply set up a dry dock activity type, then configure your engine readings template to exclude it. When a crew member logs a dry dock activity for one of your assets, the engine readings routines will be automatically removed from that asset's To Do list for the duration of the activity. Once the activity is complete, the engine readings routines will return to their regular frequencies.

Compliance

This release includes the following new features for our Compliance module.

Event-based forms

If your company has purchased Event Logs as well as Compliance, you can now take advantage of event-based forms. This new feature allows you to configure selected forms to be automatically added to your assets' To Do lists in Onboard when they're triggered by specific event types.



Example: If you want your crew to complete a barge pickup form each time they perform a barge pickup, simply set up a barge pickup event type, then configure your barge pickup form to be triggered by it. When a crew member logs a barge pick up event for one of your assets, the barge pickup form will be automatically added to that asset's To Do list. The form will be due by 23:59 on the day the event occurred.

Enhancements

This release contains the following enhancements.

Platform

This release includes the following enhancements for all our customers.

Access Helm University from the log in screen

From the Helm CONNECT log in screen, clicking **Need Help?** now displays the link to our online training and support center, Helm University.

Personnel menu item renamed to People

On the menu, under Management, you'll notice we renamed the Personnel item to People. This change was to avoid confusion with our exciting new personnel, scheduling, and payroll module, Helm CONNECT Personnel, which we'll be releasing soon.

Templates

In *Templates*, under Setup, the system will now remember which filters you applied until you manually clear them.

Maintenance

This release includes the following enhancements to our Maintenance module.

Enhanced frequency scheduler

We redesigned our frequency scheduler to give you more options and flexibility for configuring your inspections, surveys, maintenance routines, forms, and inventory counts. For each template you build, our powerful new scheduler allows you to:

- Choose whether the due date calculation is based on the template's effective date (this used to be known as the start date) or on the last date someone completed a checklist based on that template.
- Specify a specific time or times when an item is due, allowing you to configure multiple checklists from a single template. For example, if you want your crew to take engine room readings twice a day, you no longer have to build separate templates for the morning and evening readings. Instead, you could build a single readings template, and specify that it's due twice a day.

Improved load time for assets

We significantly improved the performance on the Components tab in *Assets*. Users with large numbers of components on their assets will notice much faster loading times.

New layout for printed checklists

The print layouts for our forms, inspections, surveys, maintenance routines, and inventory checklists have a fresh, clean new look that's optimized for paper.

Control which template items are required

You can now configure exactly which items your crews must complete before they can submit inspections, surveys, or maintenance routines.

Manual entry fields for inspected date and time

When you open a new copy of an inspection, survey, maintenance routine, or inventory checklist, the inspected date and time will no longer be filled in automatically. This allows you to open and close one of these items without accidentally starting a new checklist.

Completed By field removed from assigned task email notifications

We removed the Completed By field from the email notifications for assigned tasks because that field wasn't necessary.

Compliance

This release includes the following enhancements to our Compliance module.

Multiple bookmark levels displayed in PDF viewer

On the Library tab in *Documents*, the PDF viewer now shows multiple bookmark levels.

Tasks from failed items displayed in forms history

If you view a completed form in history, you can now clearly see any tasks that were created from failing items on the form.

Export forms to Microsoft Excel from the forms library

In Forms, on the Library tab, you now have the option to export completed forms directly from to Microsoft Excel. The format of this report allows you to view one form per line item.

Jobs

This release includes the following enhancements to our Jobs module.

Business rules support jobs as well as events

In addition to business rules that add or update events on an order when specified conditions are met, we now also support business rules that will either add new jobs to an order or, if a job already exists, update the job.

Invoicing enhancements

You can now customize the message and subject line for invoices emailed through Helm CONNECT. You also have the option to customize the from email address your customers see when they receive the invoice.

Additional filters for the Billing Overview

On the Overview tab, in *Billing*, you can now filter the displayed list by account numbers and ship names.

Account name displayed in Companies list view

On the Companies tab, in *Sales*, we now display the account name instead of the company name in the displayed list.