



Release Notes

Version 1.25

Copyright and Publication Information

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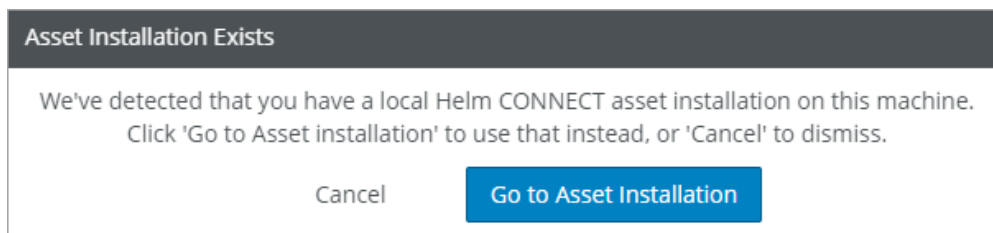
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The Platform

Our "platform" is our base product and includes the features and functionality shared by all our customers. Changes to our platform affect everyone, regardless of the product lines or modules you subscribe to. We made the following platform changes in this release.

Users alerted when asset installations are present on their computers

To prevent users from accidentally logging in to the shore version of Helm CONNECT when they should be using an asset installation, we now display a message if an asset installation has been detected on the same computer.



NOTE

This feature assumes your asset installations use the default URL of `http://localhost:8047`. If you've configured them to use a different fixed URL, please let your account manager know so they can reconfigure this feature to work with your URL. This feature doesn't currently support asset installations with unique URLs.

Find Helm CONNECT in your Windows Start menu

We now include links for Helm CONNECT asset installations on the Windows Start menu.

Account creation emails are displayed in the user's culture

The password reset emails that are sent when a new user account is created are now displayed in the culture (language) configured for each user on the Setup > Users > User tab.

Time zones automatically detected for asset installations

The time zones on your asset installations will now be updated automatically based on the time zones you've set on each installation's computer. Helm CONNECT will verify each computer's time zone every four hours and update the installation's time zone if it detects a change. This time zone will be displayed in a new Last Known Time Zone field in the detail view for each asset on the Setup > Fleet > Fleet Installations tab.

To address the situation where one asset has multiple installations (for example, if Helm CONNECT is installed on both a computer and a tablet), we added a new Primary check box in the detail view for each asset on the Setup > Fleet > Fleet Installations tab that indicates which installation should be used to detect the asset's time zone.



NOTE

When you update to Version 1.25, the active installation with the earliest created date will automatically become the primary installation but you can select another installation to be the primary one, if you'd prefer.

Time zones displayed in Management > Assets

On the Management > Assets > Assets > Details sub-tab, we added a new required field called Time Zone that is updated automatically when a time zone is detected for the corresponding asset installation.

When you update to Version 1.25, the active installation with the earliest created date will automatically become the primary installation but you can select another installation to be the primary one, if you'd prefer.



NOTE

If you update the Time Zone field manually, the asset will remain in the time zone you entered unless a new one is detected on the asset computer.

Indicators for required fields in Management > Assets

On the Management > Assets > Assets > Details sub-tab, required fields are now clearly indicated with a red asterisk.

Add hyperlinks to notes

You can now add hyperlinks to your notes throughout Helm CONNECT. This allows you to include clickable links to items in history or websites that might be relevant to an open task or even to an external storage system. Any URLs you added to your notes before this release will automatically become clickable once you upgrade to Version 1.25.

Improved layout for the change log

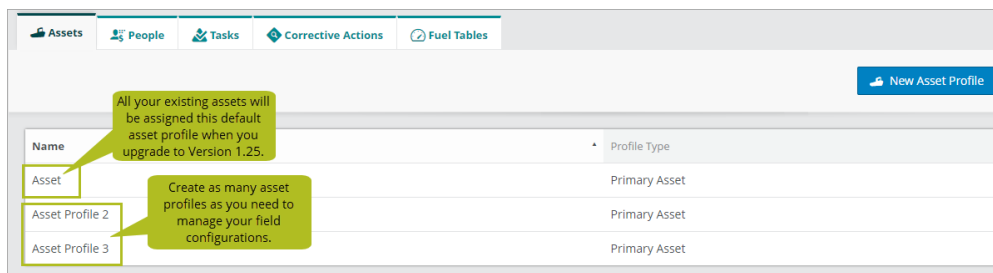
Next time you open a change log, you'll notice that we improved the layout. You can now expand the items to view more details, or collapse them to save space and make it easier to view all your items.

Helm CONNECT Maintenance and Compliance

We made the following changes to Helm CONNECT Maintenance and Helm CONNECT Compliance in this release.

Use profiles to manage the field configurations for your assets

On the Setup > Field Configurations > Assets, you can now create profiles to help you manage the field configurations for your different assets.



You can assign existing profiles to your assets by clicking in the new Asset Profile field on the Management > Assets > Assets > Details sub-tab when you're in edit mode.

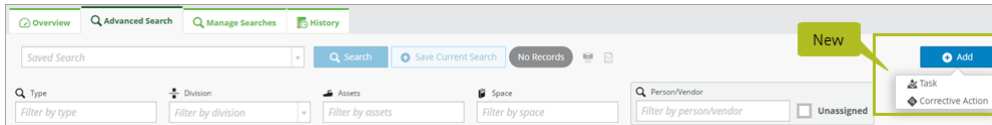
All your assets now require an asset profile. When you upgrade to Version 1.25, your existing assets will automatically be assigned a default asset profile called Asset that contains all your current field configurations. You can continue using this default profile as it is, modify it, or create new profiles for your assets.

Requisition line items must be approved before they can be set to Received on Asset or Closed

If you have requisition approvals configured, you'll now be prevented from setting line items to Received on Asset or Closed if they haven't yet been approved.

Add corrective actions manually

Previously, you could only create corrective actions while completing an audit or filling out the approval section of a form. Now, you can add them manually from the Compliance > Corrective Actions > Corrective Actions tab or the Maintenance > Overview > Advanced Search tab.

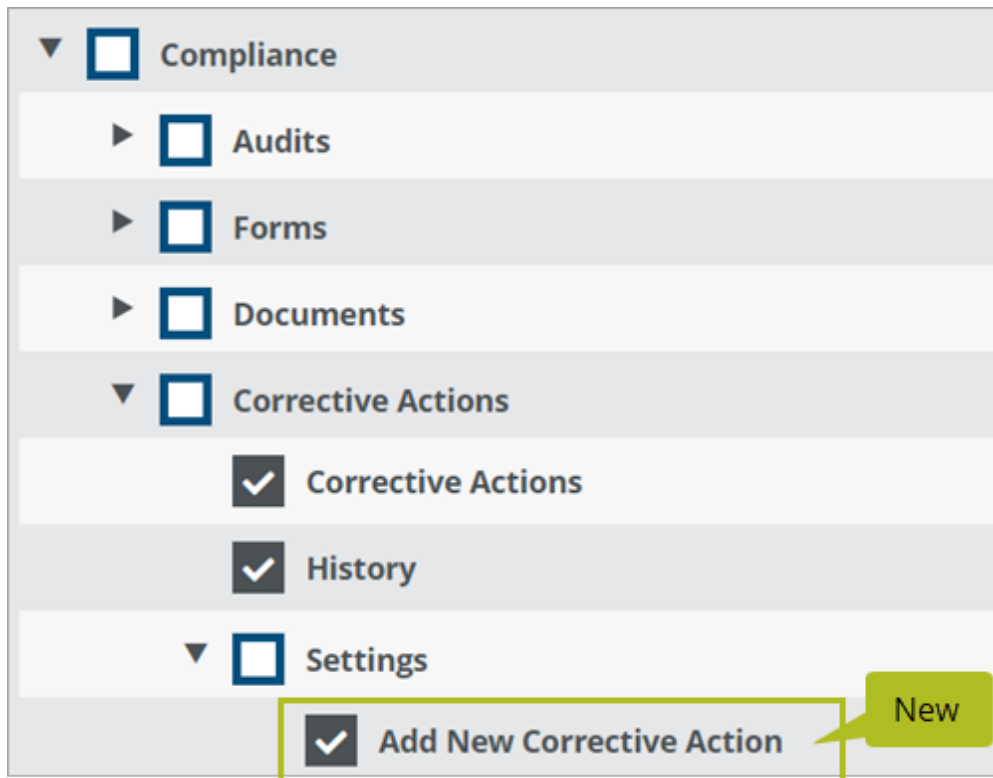


NOTE

If you add a corrective action in one of these two new places, it will be immediately published with a status of Open.

Control who can add corrective actions manually

We added a new Add New Corrective Action permission under Compliance > Corrective Actions that controls who can add corrective actions manually.

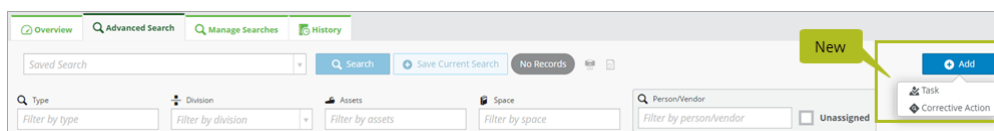


NOTE

Most users either with Compliance permissions or with Maintenance permissions plus permission to edit corrective actions will receive this new permission automatically after the upgrade to Version 1.25.

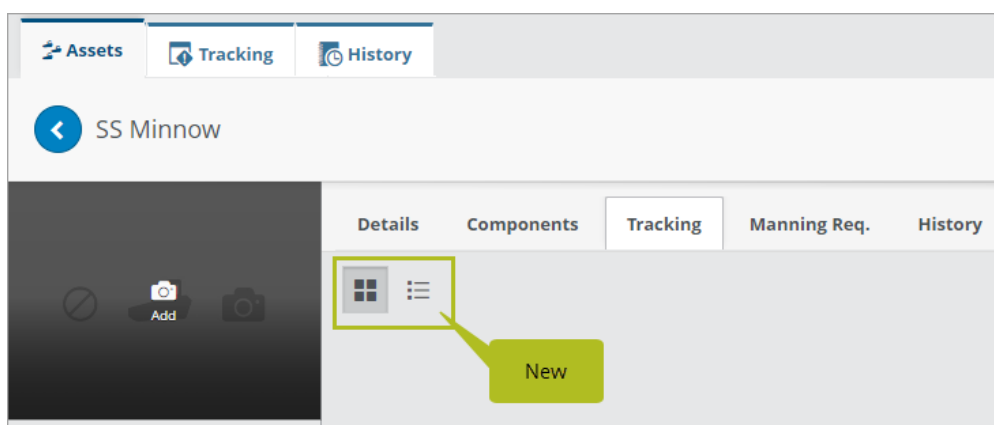
The New Task button on the Advanced Search tab is now called Add

To make room for the new manual corrective actions, we changed the name of the New Task button on the Maintenance > Overview > Advanced Search tab to Add. If you have permission to add both tasks and corrective actions, you'll now see a little menu when you click the button that allows you to select Task or Corrective Action. If you only have permission to add one of those items, clicking the Add button will just open the window where you can add that item.



Toggle between a list view or card view on the Tracking sub-tabs

You now have the option of displaying your certifications on the Management > Assets > Assets > Tracking sub-tab in a list view instead of a card view. New icons near the top of the Tracking sub-tab allow you to toggle between the new list view and the original card view.



Corrective actions assigned to shore can be viewed onboard

Previously, only corrective actions that had been assigned to an asset could be viewed on that asset. Now, your crew can view corrective actions that have been assigned to shore or to the next dry dock from their assigned spaces and the History tab in Onboard > Logs.



NOTE

For a corrective action to be visible from a space in Onboard > Logs, that space must be selected from the "Show in" field in the New Corrective Action or Update Corrective Action window.

Name fields pre-fill with the name of the logged-in user

To save time, most fields that require a user to select their own name from a list (for example, the “Created by” field on a new task or the “Posted by” field on a note) will now pre-fill those fields with the name of the logged-in user.

Inspected By fields on checklists and the Filled By fields on forms work slightly differently than other name fields because the user who starts a checklist or form is not always the same user who finishes it. If the user leaves the Inspected By or Filled By field empty, that field will be filled with the name of the logged-in user when the checklist or form is finished. However, if the user selects a name from one of those fields—even the name of another user—the selected name won’t be overwritten with the name of the logged-in user when the checklist or form is finished.



NOTE

For this feature to work, the status of the logged-in user must be active and they must have either the Can Log In To Shore or Can Log In To Asset setting selected on their profile.

Control who can edit the Order Qty fields on inventory checklists

We added a new Can Edit Order Qty permission under Inventory > Settings that controls who can edit the Order Qty fields on Inventory checklists.



NOTE

Most users with Inventory permissions in their roles will receive the new Can Edit Order Qty permission automatically after the upgrade to Version 1.25.

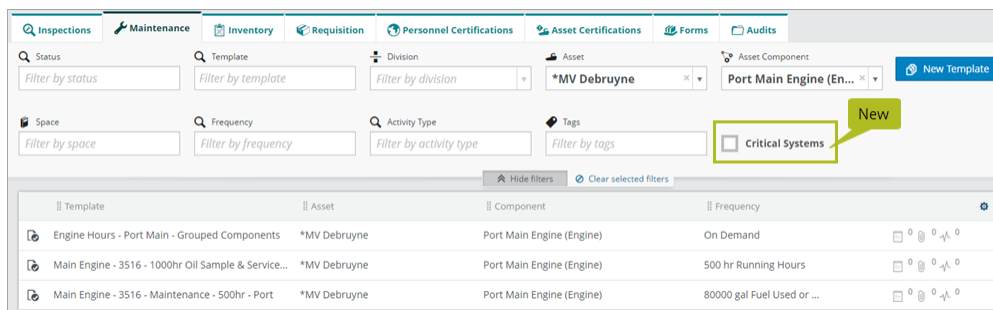
Clearly see when critical systems are affected

We added Critical System icons to several more places in Helm CONNECT to help you see clearly when your critical systems will be affected. You’ll notice these new icons in the following places:

- **Setup > Templates > Maintenance:** We now display Critical Systems icons in the list view. You'll also see the icons in the header of a template when you select one from the list and view or edit it.
- **Maintenance > Overview > Advanced Search:** We now display Critical Systems icons in the list view.
- **Maintenance > Overview > History:** We now display Critical Systems icons in the list view.
- **Onboard > Logs:** If you're viewing a work space as a list view instead of a card view, a new, sortable Critical Systems column clearly indicates which items are related to critical systems.

Quickly find maintenance templates for critical systems

On the Setup > Templates > Maintenance tab, we added a new Critical Systems check box so you quickly find templates associated with critical systems.



Modify the asset distribution list on a published inspection template

You can now make changes to the asset distribution list on an inspection or survey template directly on the published template without having to edit and re-publish the template.



NOTE

This is now our recommended way of updating your asset distribution list because it helps keep your template revision history cleaner.

To modify the asset distribution list without republishing

1. From the **Setup > Templates > Inspections** tab, select a template from the list (don't click Edit) then either click in the **Assets** field or click the **Assets** icon to the right of the screen to display the Assets overlay.
2. Use the new filters near the top of the Assets overlay to quickly find the assets you need, then make your changes.

The screenshot shows the 'Assets' overlay with a search bar and a filter dropdown. A yellow box highlights the search bar and the filter dropdown. A green callout bubble points to the filter dropdown with the text 'New'. The table below has columns for Name, Short Name, Asset Type, and a checkbox. The first two rows are highlighted in blue.

Name	Short Name	Asset Type	
*MV Debruyne	Debruyne	-	<input checked="" type="checkbox"/>
MV Pace	Pace	-	<input checked="" type="checkbox"/>
MV Rosa	Rosa	-	<input type="checkbox"/>
Warehouse	W-1	-	<input type="checkbox"/>
MV Barrow	Barrow	-	<input type="checkbox"/>
MV Piper	Piper	-	<input type="checkbox"/>

3. Click outside the Assets overlay to close it, then click **Save Assets**.



NOTE

All other changes to a published template still require that you open the template in edit mode, make your changes, then re-publish the template.

More control over the required fields on your tasks and corrective actions

We're giving you more control over the required fields on your tasks and corrective actions so you can ensure all the information needed for your departmental reporting has been captured. From the Tasks and Corrective Actions tabs under Setup > Field Configurations, you now have the following three options for your required fields:

- **Not required:** These fields won't prevent users from saving or finishing an item if they haven't been filled in.
- **Always required:** These fields must be filled to save or finish an item.
- **Only required on completion:** These fields must be filled to finish an item, but users won't be prevented from saving if they haven't yet been filled.



NOTE

To protect your compliance workflow, corrective actions containing fields set to "Only required on completion" can't be finished onboard; they must be finished on shore.

The screenshot shows the 'Corrective Actions' configuration interface. At the top, there are tabs for 'Assets', 'People', 'Tasks', 'Corrective Actions', and 'Fuel Table'. Below the tabs, a warning message states: 'Items set to "Only required on completion" can't be completed on the asset.' To the right of the warning are 'Discard Changes' and 'Save Changes' buttons. Below the warning is a table with columns for field names and their required status. The fields listed are 'Tags', 'Component', 'Location', 'Source Type', and 'Source'. The 'Location' field is currently set to 'Show' and 'Always required'. A dropdown menu is open for the 'Location' field, showing three options: 'Not required', 'Always required', and 'Only required on completion'. A green callout box labeled 'New' points to the 'Only required on completion' option in the dropdown.

Field	Visibility	Requirement
Tags	Show	Not required
Component	Show	Always required
Location	Show	Only required on completion
Source Type	Hide	Not required
Source	Hide	Always required

Quickly find your shore only forms in history

On the Compliance > Forms > History tab, we added a new Shore Only check box that lets you quickly find your shore only forms.

Filter by asset on the Management > People > History tab

We added a new Assets filter to the Management > People > History tab.

Asset fields on corrective actions pre-fill with the asset name

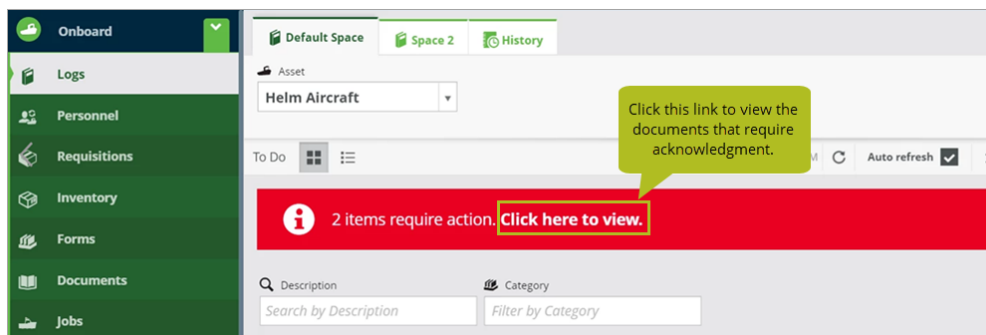
If you add a corrective action while completing an audit for a specific asset, the Asset field now pre-fills with the name of the asset.

Set up e-signatures for forms

First launched as a pre-release in Version 1.21, e-signatures for forms are now available automatically to all Helm CONNECT Compliance customers. For more information, see the "Set up e-signatures for forms" article on our support site, Helm U (www.helmu.ca.)

Alert your crew when documents must be acknowledged

First launched as a pre-release in Version 1.21, the onboard notification banner is now available automatically to all customers who subscribe to the Documents module. This red notification banner will display at the top of the To Do list in Onboard > Logs to alert your crew when there are documents waiting to be acknowledged. The banner displays the number of items that require action and includes a link to open the Items Requiring Action window. For more information, see the "Alert your crew when documents must be acknowledged" article on our support site, Helm U (www.helmu.ca.)



Send email notifications for notes on tasks

First launched as a pre-release in Version 1.22, task note notifications are now available automatically to all customers who subscribe to the Forms module. For more information, see the "Send email notifications about notes on tasks" article on our support site, Helm U (www.helmu.ca.)

Send email notifications for notes on corrective actions

First launched as a pre-release in Version 1.24, corrective action note notifications are now available automatically to all Helm CONNECT Compliance customers. For more information, see the "Send email notifications about notes on corrective actions" article on our support site, Helm U (www.helmu.ca.)

Assets (Beta) tab available as a pre-release

Available now as a pre-release, the Management > Assets > Assets (Beta) tab displays your assets in a list view instead of in the card view used by the current Management > Assets > Assets tab. Designed for customers with large numbers of assets in Helm CONNECT, the Assets (Beta) tab makes it easy to see, filter, and sort all your assets.

Please reach out to your account manager if you have any questions or would like to see a demo of the Assets (Beta) tab.

Inventory storage locations available as a pre-release

Available now as a pre-release, inventory storage locations allow you to track your parts by their specific locations on each of your assets and transfer parts from one location to another. As this is a pre-release, this feature doesn't yet integrate with all inventory items in Helm CONNECT.

Please reach out to your account manager if you have any questions or would like to see a demo of inventory storage locations.

Helm CONNECT Jobs

We made the following changes to Helm CONNECT Jobs in this release.

Logged By fields now pre-fill with the name of the logged-in user

For consistency with the Logbook module, the Logged By fields on events and activities logged from Onboard > Logs will now pre-fill with the name of the logged-in user.



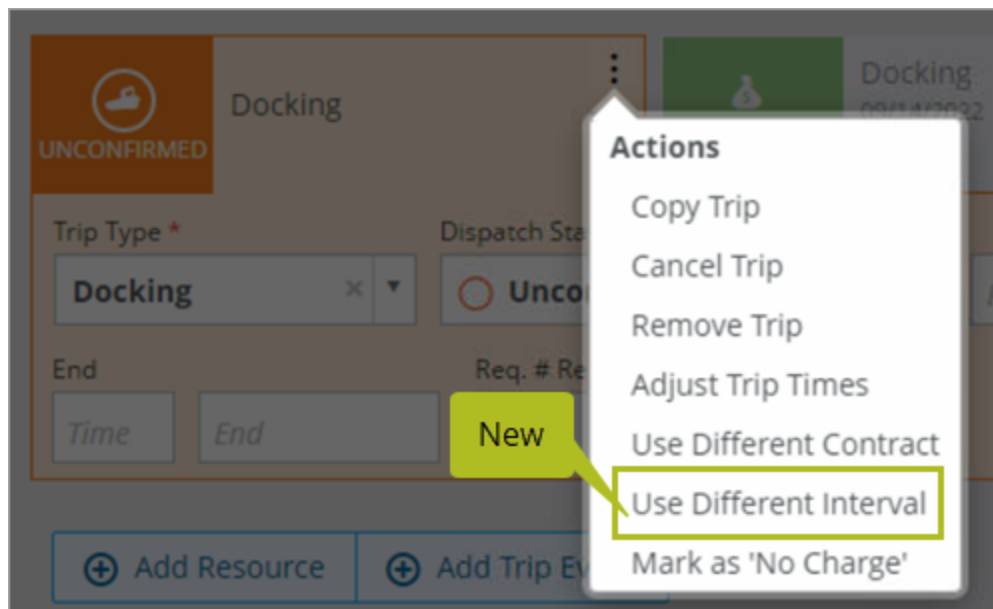
NOTE

For this feature to work, the status of the logged-in user must be active and they must have either the Can Log In To Shore or Can Log In To Asset setting selected on their profile.

Improvements to interval billing

We made several improvements to our interval billing feature in this release:

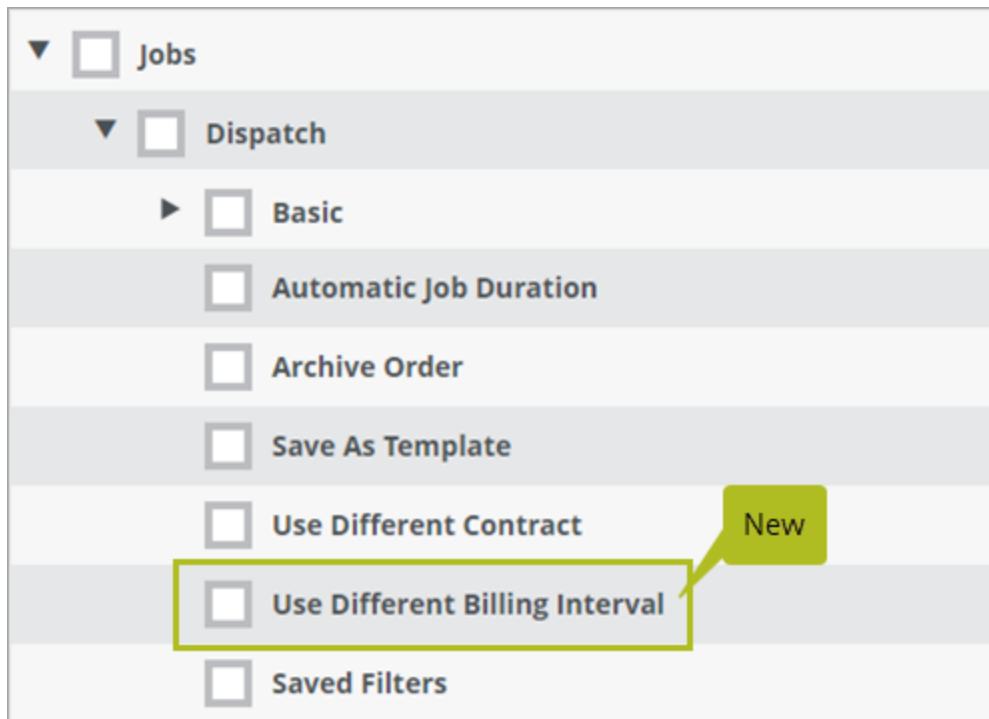
- You can control which interval each trip is assigned to and you have the flexibility to change the interval on a trip to another one that's ready to bill.



- You can view and invoice up to three intervals in advance, allowing you to calculate and invoice billing transactions before the start or end date of an interval has passed.

Control who can select a different interval for a trip

We added a new Use Different Billing Interval permission under Jobs > Dispatch that controls who can change the billing interval on a trip.

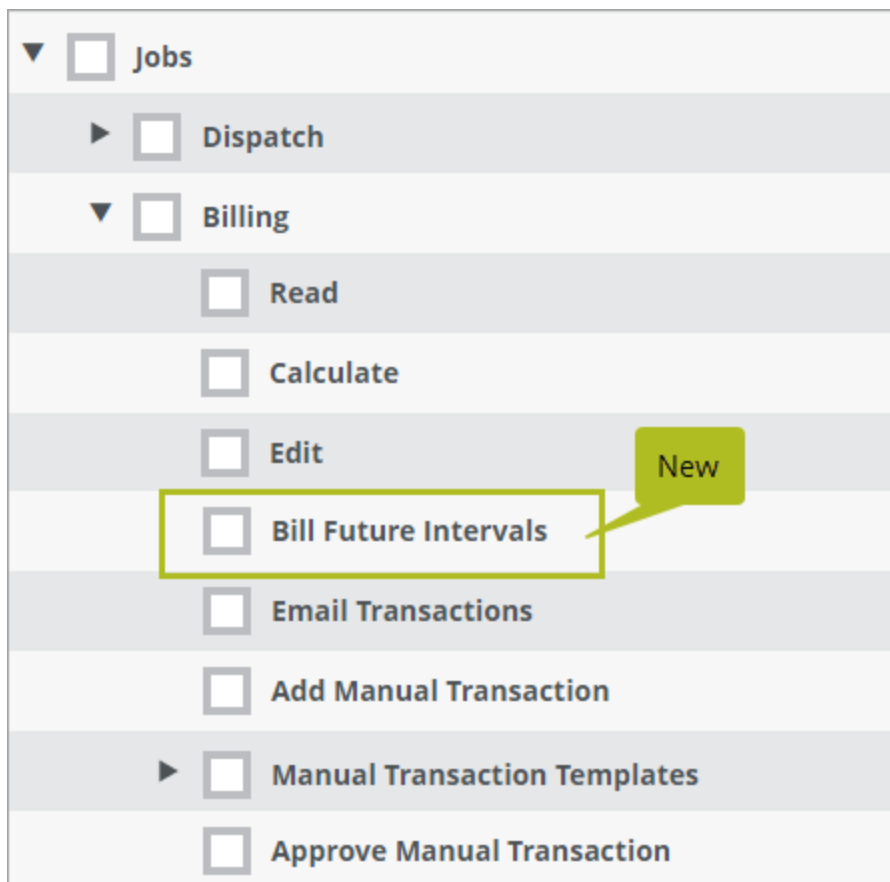


NOTE

Users will not receive this new permission automatically after the upgrade to Version 1.25. If any users need this permission, you must add it to their roles manually.

Control who can bill future intervals

We added a new Bill Future Intervals permission under Jobs > Billing that controls who can bill future intervals.

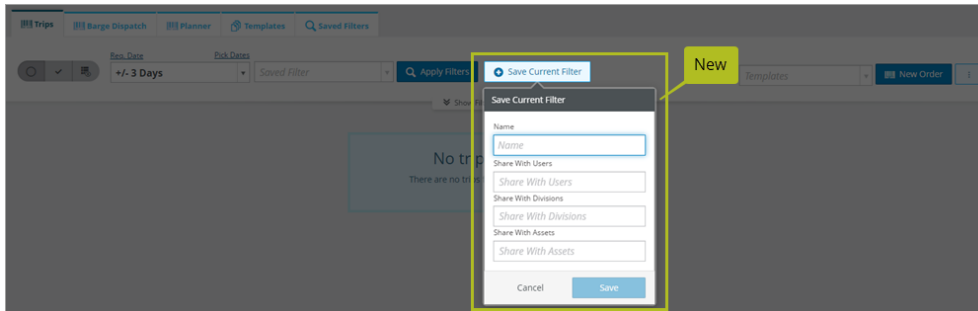


NOTE

Users will not receive this new permission automatically after the upgrade to Version 1.25. If any users need this permission, you must add it to their roles manually. To bill future intervals, users must also have the existing Allow Early Billing of Intervals permission.

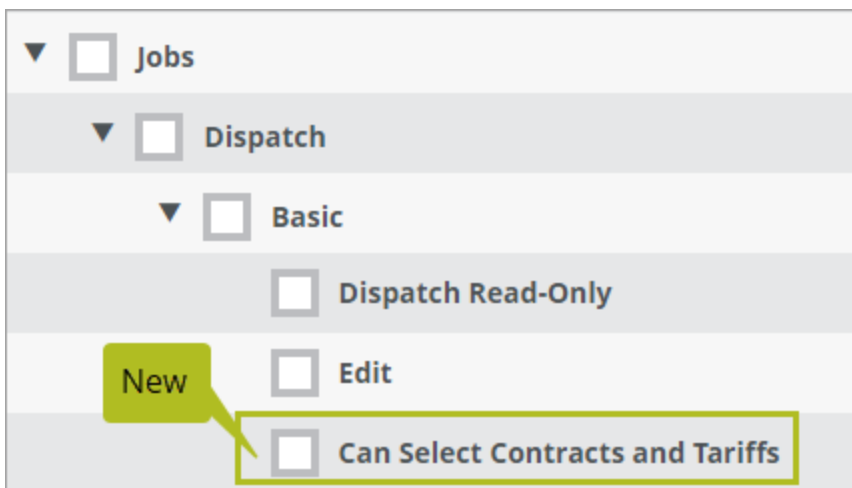
Save and share filters on the Trips grid

You now have the option to save your frequently used filters on the Jobs > Dispatch > Trips tab (also known as the Trips grid) and share them with other users, divisions, or assets so you can all work with the same view.



Control who can select contracts or tariffs on an order

We added a new Can Select Contracts and Tariffs permission under Jobs > Dispatch > Basic that gives users the ability to select contracts and tariffs on an order without requiring them to have the Jobs > Contracts permission.

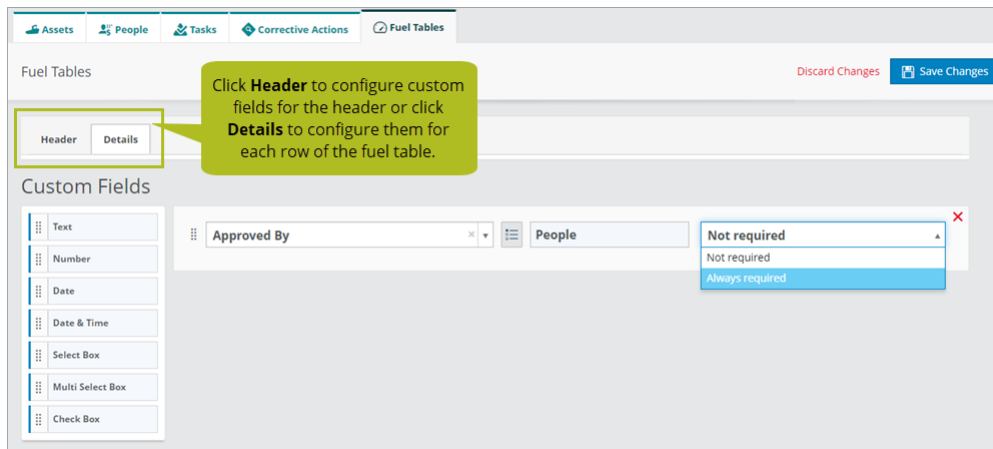


NOTE

This permission will not be turned on in your tenant automatically after the upgrade to Version 1.25. Please reach out to your account manager if you're interested in having this permission turned on.

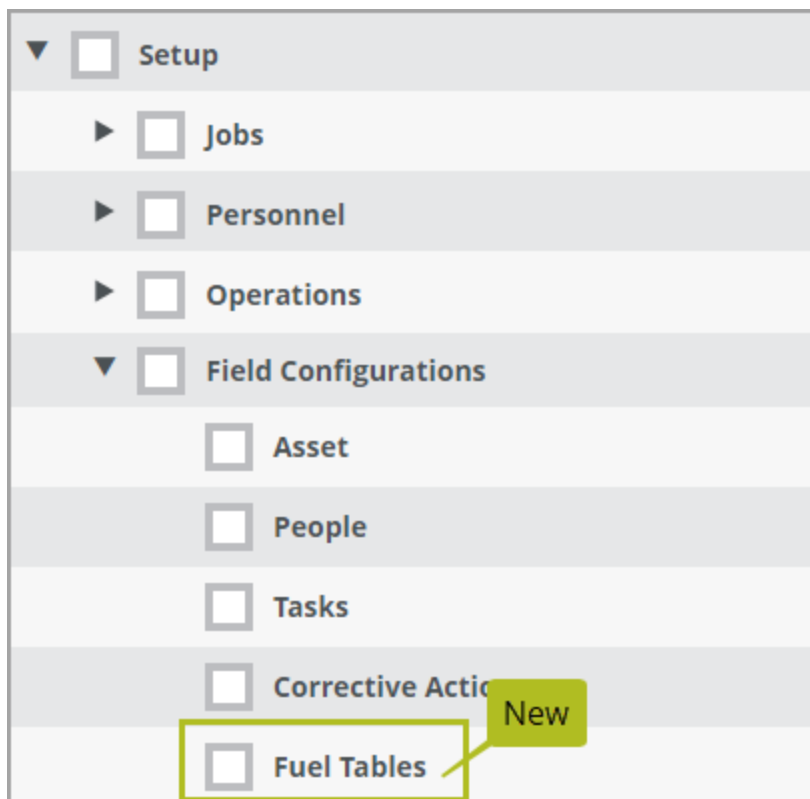
Create custom fields for fuel tables

We added a new Setup > Field Configurations > Fuel Tables tab that allows you to add custom fields to your fuel tables.



Control who can configure fuel table fields

We added a new Fuel Tables permission under Setup > Field Configurations that controls access to the Setup > Field Configurations > Fuel Tables tab.



NOTE

This permission will be turned on automatically at the tenant level for our Helm CONNECT Jobs customers but, if you want specific users to have it in their roles, you must add it manually.

View ship names from Onboard > Logs > History

We added a new Ship Name column to the Onboard > Logs > History tab. This column will be hidden by default when you upgrade to Version 1.25, but you can display it by clicking the Column Selector icon.

Record the received date on your orders

We added a new Received Date field to the header of the Jobs > Dispatch > Trips tab. In the list view and expanded trip view on the Trips tab, the Received Date is split into two columns: Received Date and Received Time. The Received Date field is also available as a billing condition for your contracts, tariffs, or payable charges.

The Received Date field will be hidden by default when you upgrade to Version 1.25, but you can go to the Setup > Orders > Order Configurations tab to configure whether or not it's required, and whether it should show on shore, on your assets, both, or not at all.



NOTE

If you subscribe to Helm CONNECT Portal, the Receive Date field will be updated automatically by the Portal.

Create manual transaction templates

We added a new Jobs > Billing > Manual Transaction Templates tab that allows you to create templates for your manual transactions.

The screenshot shows the 'Manual Transaction Templates' tab in the Helm CONNECT Portal. The form is titled 'Template' and includes a 'Template Name' field. Below this, there are several sections for configuring the template:

- Division:** A dropdown menu with 'Division' selected.
- Transaction Type:** A dropdown menu with 'Transaction Type' selected.
- Use Address From Invoice:** A checkbox that is currently unchecked.
- Address:** A dropdown menu with 'Address' selected.
- Use Account From Invoice:** A checkbox that is currently unchecked.
- Account:** A dropdown menu with 'Account' selected.
- Use Currency Type From Invoice:** A checkbox that is currently unchecked.
- Currency:** A dropdown menu with 'Currency' selected.
- Amount Type:** A dropdown menu with 'Flat Rate' selected.
- Flat Rate:** A text input field with 'Flat Rate' entered.
- Billing Type:** A dropdown menu with 'Billing Type' selected.
- Description:** A text input field with 'Description' entered.

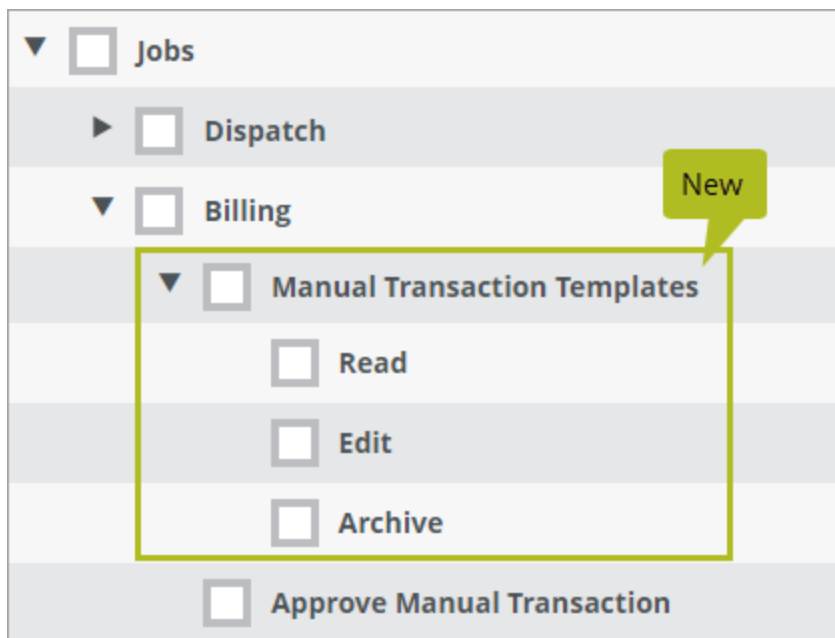
In the Add Manual Transaction window, you can select the template you want to use from the new Template field.

The screenshot shows the 'Add Manual Transaction' window. The 'Template' field is highlighted with a green box and a 'New' label. The 'Transaction Date' is set to 11/13/2022. The 'Currency' is set to CAD. The 'Amount Type' is set to Percentage. The 'Percentage' field is empty. The 'Billing Type' field is empty. The 'Exclude Billing Types' field is empty. The 'Description' field is empty. The 'Create Transaction' button is highlighted in blue.

You also have the option to set default manual transaction templates for your divisions on the Setup > Invoicing > Billing Settings tab.

Control access to manual transaction templates

We added a new group of Manual Transaction permissions under Jobs > Billing that provides access to the new Jobs > Billing > Manual Transaction Templates tab, and controls who can read, edit, or archive manual transaction templates.



Here's how the permissions work:

- **Read:** Allows users to select a manual transaction template from the new Templates field in the Add Manual Transaction window. Users without this permission won't see the Templates field.
- **Edit:** Allows users to access the Manual Transaction Templates tab, add a new manual transaction template, or edit an existing one.
- **Archive:** Allows users to delete a manual transaction template.



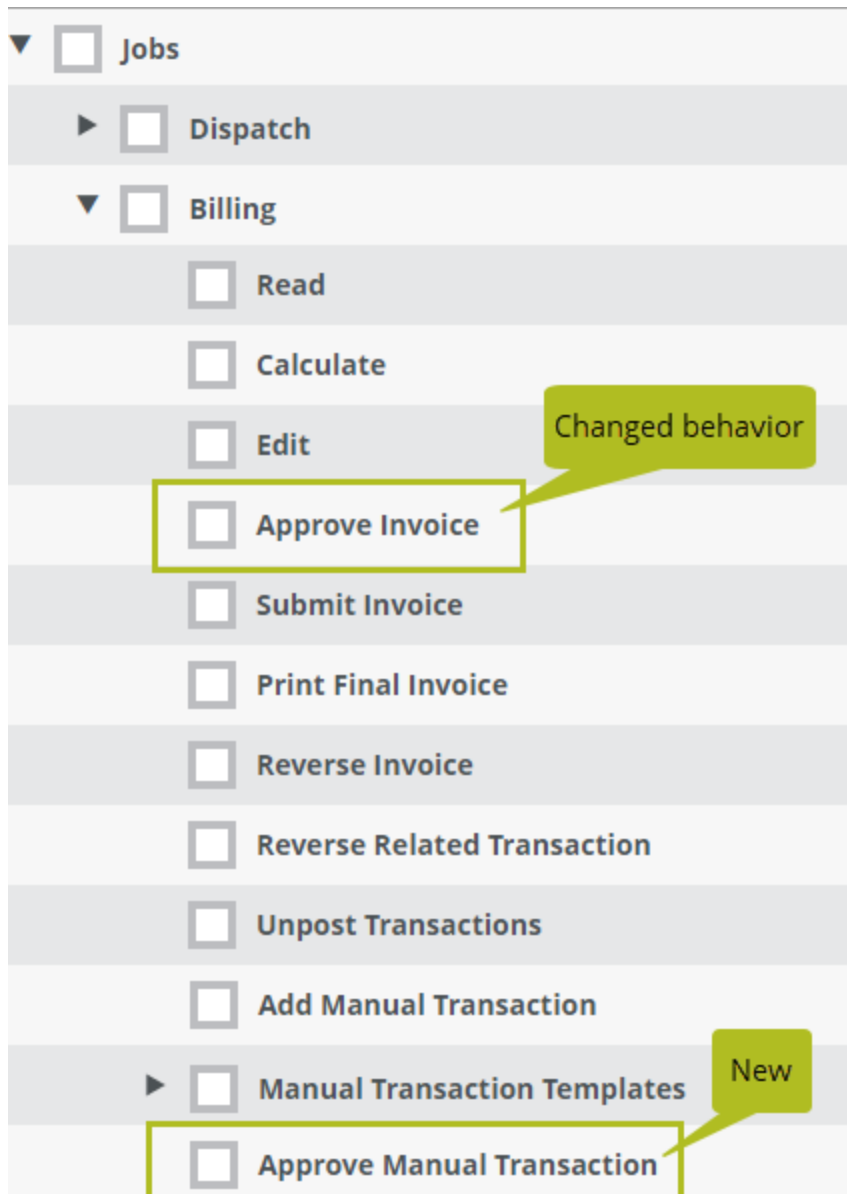
NOTE

These permissions will be turned on automatically at the tenant level for our Helm CONNECT Jobs customers but, if you want specific users to have them in their roles, you must add them manually.

Control who can approve manual transactions

Previously, the Approve Invoice permission under Jobs > Billing controlled who could approve invoices as well as who could approve manual transactions. We

changed the behavior of the Approve Invoice permission so it only controls who can approve invoices, and we added a new Approve Manual Transaction permission to control who can approve manual transactions.





NOTE

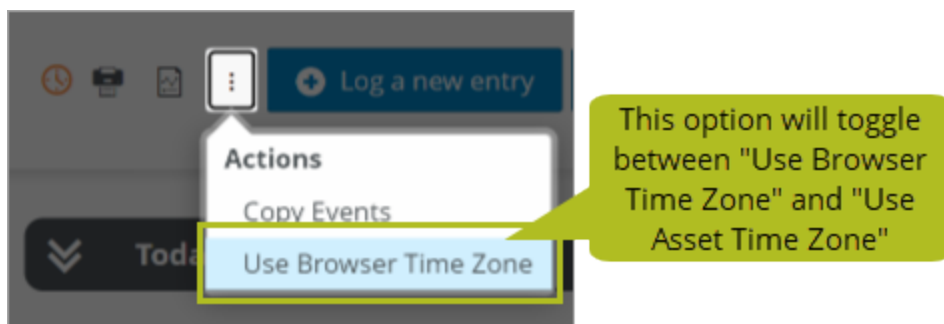
Anyone who previously had the Approve Invoice permission will automatically receive the Approve Manual Transaction permission after the upgrade to 1.25.

Trips grid now shows both the date and time in custom fields

We addressed an issue where Date & Time custom fields only showed the date, not the time, on the grid on the Jobs > Dispatch > Trips tab.

View Logbook items in the asset's time zone

You can now choose whether to view the items on the Onboard > Logs > Logbook tab in your browser's time zone or the asset's time zone. Your selection will apply to the logbook itself, as well as to the widget pane, the PDF report, and the CSV file.



If you select "Use Asset Time Zone," you'll see a new clock icon to the left of the Print icon. If the clock icon is orange, you can hover over it to see a tooltip showing the asset's time zone. If the asset doesn't have a time zone, the clock icon will be red, and the tooltip will let you know that an asset time zone couldn't be found so the browser time zone will be used.



NOTE

Asset time zones are new in Version 1.25. For more details, please see “Time zones automatically detected for asset installations” and “Time zones displayed in Management > Assets” in the Platform section of these release notes.

Helm CONNECT Personnel

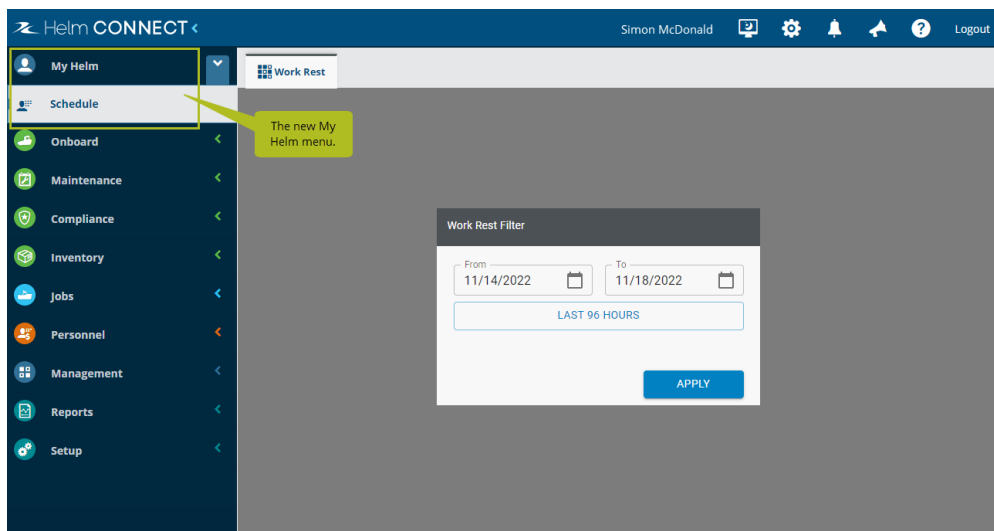
We made the following changes to Helm CONNECT Personnel in this release.

Introducing the new Crew Scheduling module

Our new Crew Scheduling module—a simple, visual way of quickly assigning crew to assets—is now available! Please check out this blog post for all the details, and reach out to your account manager if you have any questions or would like to set up a demo.

Manage your work-rest data with My Helm

With your crew in mind, we added a new My Helm menu to the top of the menu bar so individuals can quickly and easily take care of the things they're responsible for. All the tabs in this handy new dashboard will only display information relevant to the logged-in user. In this release, we're starting our rollout of My Helm with a Work Rest tab for your crew to manage their work-rest data. In future releases, we'll add tabs for your crew to see their certifications and crew changes and to manage any work they've been assigned.



Work Rest: Include notes and confirmations in the PDF report

You now have the option to include notes and confirmations in your PDF reports.

The screenshot shows the 'Work Rest Filter' interface. On the left, there are input fields for 'Starting' (11/07/2022), 'Previous' (96), 'Division', 'Assets', and 'Crew' (listing Adam Warlock, Ben Parker, Bucky Barnes, and Clint Barton). Below these, there are two checkboxes: 'Include Notes' and 'Include Confirmations', both of which are checked. A yellow callout box points to these checkboxes with the text: 'You can include notes and confirmations in your PDF reports.' On the right, a list titled 'Found 4 crew that match this filter' shows the names and roles of the four crew members. At the bottom right, there are 'CANCEL' and 'APPLY' buttons.

Work Rest: Confirm partial days

You now have the option to allow your users to confirm partial days of work-rest data.

The screenshot shows the 'General Settings' interface. On the left, there is a sidebar with navigation links: 'General', 'Work Rest Rules', 'Shifts', 'Rule Groups', and 'Reporting'. The main area is titled 'General Settings' and has a 'SAVE' button. It contains two sections: 'Non-compliant formatting' and 'Confirmation'. The 'Confirmation' section has a checkbox labeled 'Allow partial days to be confirmed', which is checked. A yellow callout box points to this checkbox with the text: 'New'. The 'Non-compliant formatting' section shows a text input field with 'Non-Compliant' and a set of formatting buttons (B, I, U, a red icon, and W).

Work Rest: Night mode settings applied to Work Rest tabs

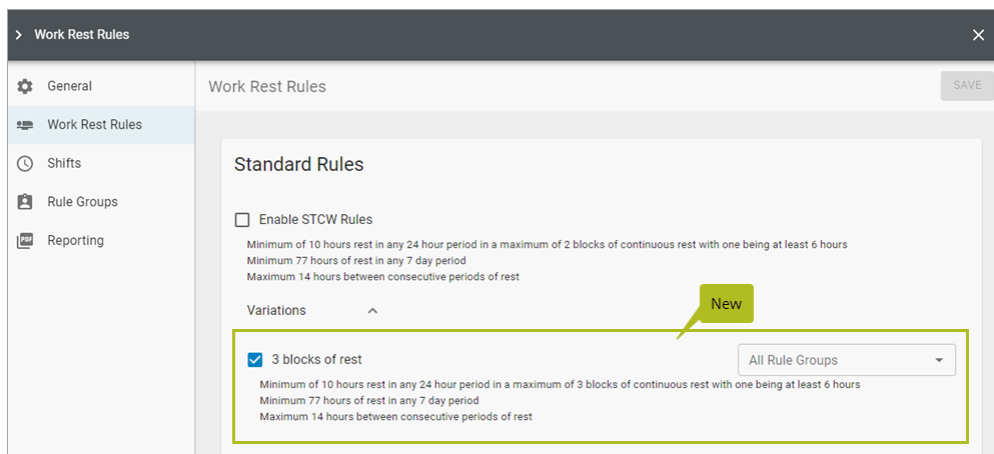
If you select any of the Night Mode options under User Preferences on the toolbar, your settings will now apply to the Work Rest tabs.

Work Rest: The Rule Groups header is now sticky

When you're managing your rule groups, you'll notice that the header at the top of the rule groups grid is now "sticky," which means it stays in place when you scroll.

Work Rest: Variations available for customers who don't use STCW as their standard rules

For customers who don't use STCW, you now have the option to select "3 blocks of rest" as your standard rule instead.



Edit assigned crew from Onboard

On the Onboard > Overview > Asset Details tab, your crew can now use the Assigned Crew field to change the assigned crew for an asset.

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Asset Details

Asset: *MV Debruyne

Name *	Short Name *	Asset Profile *	Division *	Operating Areas	IMO	MMSI
*MV Debruyne	Debruyne	Asset	Helm Tug Co.	LA/LB - Los Angeles / Lon...	IMO	123456

Time Zone: Time Zone

Responsible Parties: 0 Responsible Parties

Assigned Crew: 1 Assigned Crew

Callout: Crew with the Edit Assigned Crew Onboard permission in their role can change the assigned crew on their asset.

Control who can edit assigned crew from Onboard

We added a new Edit Assigned Crew Onboard permission under Extras that controls who can make changes to the Assigned Crew field on the Onboard > Overview > Asset Details tab.

▼ ☐ Extras

- ☐ Edit Order After Billing
- ☐ Edit Trip After Billing
- ☐ Edit Job After Billing
- ☐ Edit Trip Event After Billing
- ▶ ☐ E-Signatures
- ☐ Onboard Notification Banner
- ☐ Send Corrective Action Note Notifications
- ☐ Send Task Note Notifications
- ▶ ☐ Storage Locations
- ☐ Edit Request Account Type
- ☐ Edit Assigned Crew Onboard

Callout: New

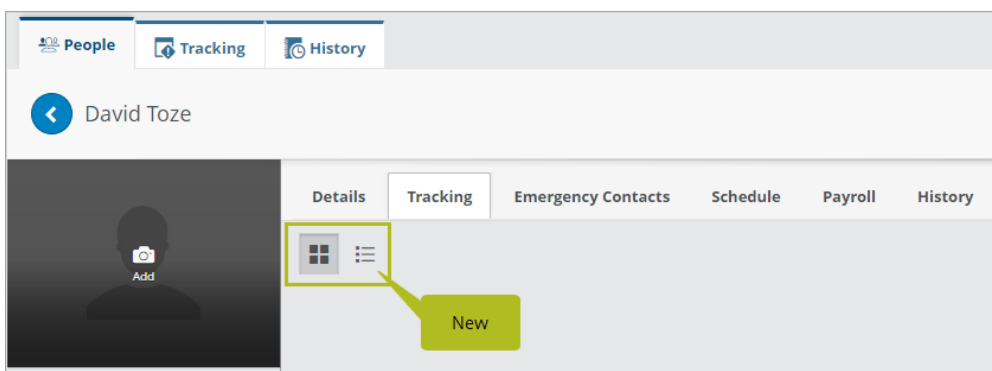


NOTE

This permission will be turned on automatically at the tenant level for all of our customers but, if you want specific users to have it in their roles, you must add it manually.

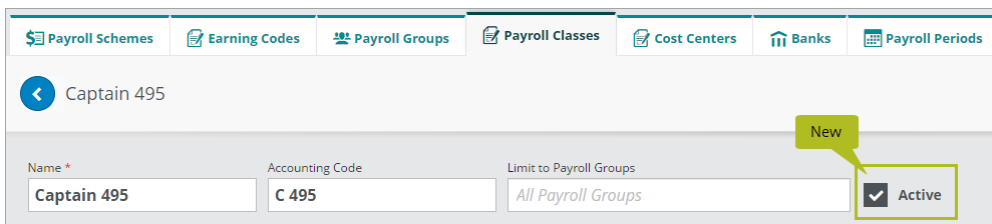
Toggle between a list view or card view on the Tracking sub-tabs

You now have the option of displaying your certifications on the Management > People > People > Tracking sub-tab and the Onboard > Personnel > Crew > Tracking in a list view instead of a card view. New icons near the top of the Tracking sub-tabs allow you to toggle between the new list view and the original card view.



Filter payroll information by asset

A new Assets filter on the Personnel > Payroll > Payroll Details tab gives you the option to view your payroll by asset.



**NOTE**

The Banks section of a transaction line is not affected by the Asset filter.

Manage inactive payroll classes

You now have the option to make payroll classes inactive instead of deleting them. That way, if you need to use a payroll class again at a later date, you can make it active again. Inactive payroll classes won't appear in any drop-down lists; however, if an inactive payroll class was already selected in a field at the time you made it inactive, it will display in that field with "Inactive" appended to the end of its name. Setting a payroll class to Inactive won't affect any existing payroll rules that use that payroll class.

On the Setup > Payroll > Payroll Classes tab, while you're editing a payroll class, use the new Active check box to toggle the payroll class between Active and Inactive status.

We added a new Payroll Classes filter to the list view on the Payroll Classes tab so you can decide whether to view all your payroll classes, just the active ones, or just the inactive ones. We also added a similar Payroll Classes filter to the Payroll Class Rates report data source.

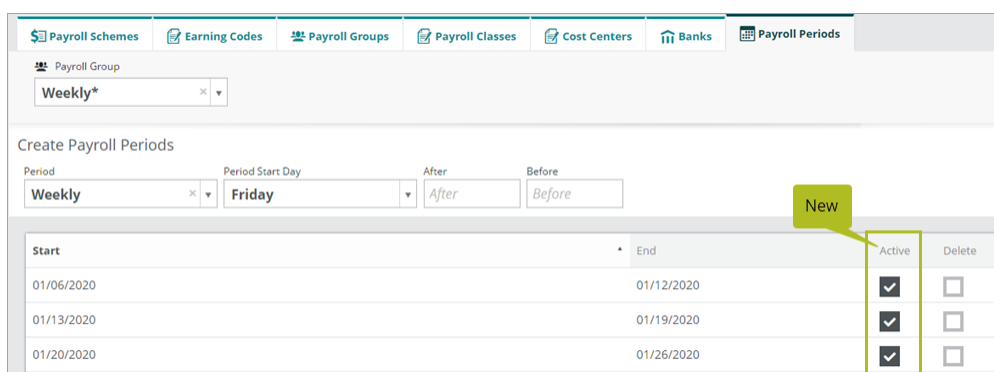
**NOTE**

When you upgrade to 1.25, all your existing payroll classes will be set to Active by default.

Manage inactive payroll periods

You now have the option to make payroll periods inactive instead of deleting them. That way, if you need to use a payroll period again at a later date, you can make it active again.

On the Setup > Payroll > Payroll Periods tab, we added a new Active column that allows you to toggle each payroll period in the list between Active and Inactive status. Inactive payroll periods won't appear in any Payroll Period drop-down lists.



Start	End	Active	Delete
01/06/2020	01/12/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/13/2020	01/19/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/20/2020	01/26/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>

When you upgrade to 1.25, all your existing payroll periods will be set to Active by default.

Display forecasted data on the Overview tab

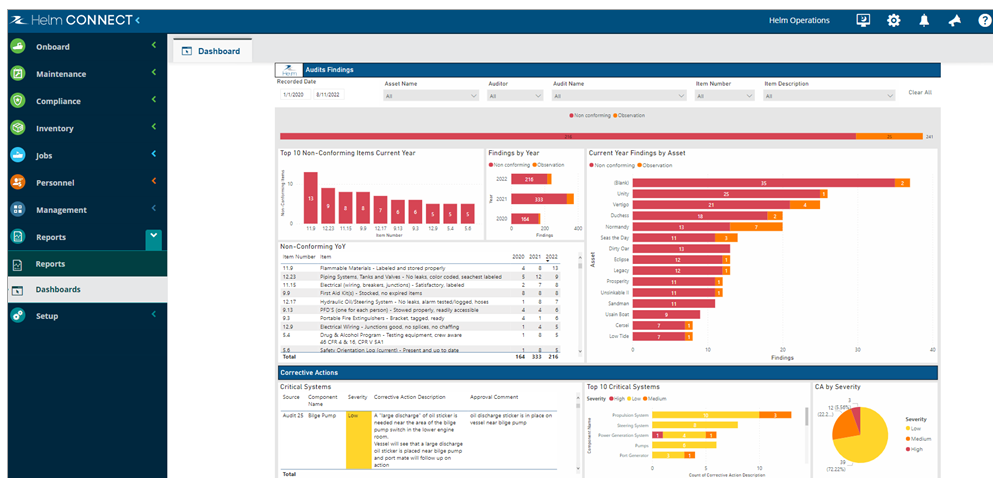
Previously, the Personnel > Payroll > Overview tab only displayed actual data, with no option to show forecasted data. Now, new "Show actuals" and "Show forecasted" buttons near the top of the tab allow you to toggle between actual and forecasted data.

Reports and Dashboards

We made the following changes to our reports and dashboards in this release. These changes may also affect report data linked to systems outside of Helm CONNECT, such as Power BI. If you have any questions about reports and their data sources, please contact your account manager.

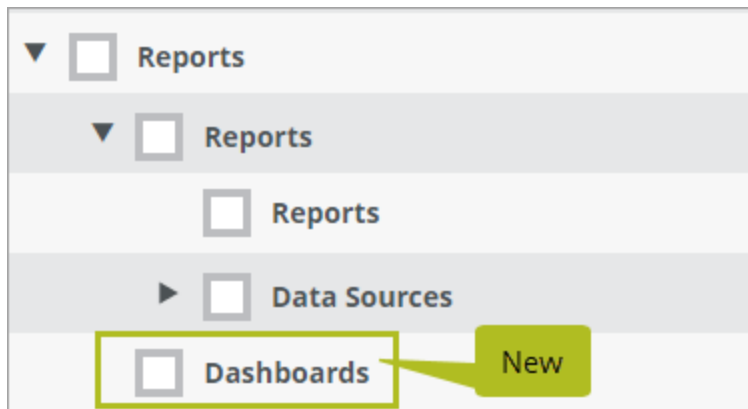
Access your analytics in Helm CONNECT

Our Maintenance and Compliance (MC) and Jobs Dashboards help you visualize and filter your data by combining data sources across Helm CONNECT. In this release, we've put this valuable information at your fingertips by embedding it right in Helm CONNECT.



Control who can view your dashboard data

We added a new Dashboards permission under Reports that controls who can view the Dashboard tab.



NOTE

Users will not receive this new permission automatically after the upgrade to Version 1.25. If any users need this permission, you must add it to their roles manually.

New Reading Values data source

We added a new Reading Values data source to help you review and report on readings entered into Helm CONNECT through maintenance checklists and external readings imported through the new Create Readings API endpoint.

New Fleet data source

We added a new Fleet data source to help you review and report on the information from the Setup > Fleet > Fleet Installations tab.

New Time Zone field in the Assets data source

We added a new Time Zone field to the Assets data source.

People data source includes who can log in

We added three new Yes/No fields to the People data source that allow you to report on who can log into Helm CONNECT:

- Can Login
- Can Login To Asset
- Can Login to Shore

New Received Date field added to several data sources

We added a Received Date field to the following data sources:

- AR Transactions
- AP Transactions
- Billing Discrepancies
- Interval Billing Trips
- Job Revenue
- Orders
- Resource Utilization
- Trip Revenue
- Trips

Include manual corrective actions in the Corrective Action data source

For corrective actions that were added manually, the Source Type column will display “Corrective Action” and the Source column will be blank (empty).

Include drafts in the AR and AP Transactions data sources

A new Include Drafts check box in the headers of the AR Transactions and AP Transactions data sources gives you the option to review and report on transactions that haven't yet been submitted.

Include Tariff notes in the Notes data source

In the Notes data source, the Note Type list now includes a Tariff option.

Additional date filters in the Tasks and Corrective Actions data sources

In the Tasks and Corrective Actions data sources, we added a Filter On list with options for: Created Date, Due Date, Deleted Date, and Finished Date. We also added a new Include Empty Dates check box that allows you to include empty dates in your reports.

Improvements to the Maintenance Templates filter in the Maintenance Checklist data source

In the Maintenance Checklists data source, the Maintenance Templates filter makes it easier to differentiate between templates with the same name by displaying the asset name as well as the template name.

Include task fields in the checklist data sources

In the checklist data sources, we added a new group of fields called Task that allow you to review and report on the tasks associated with your checklists.

Include task fields in the Forms data source

In the Forms data source, under Item Values, we added a new group of fields called Task that allow you to review and report on the tasks associated with your forms.

Payroll Class Rates data source filters data by users' payroll groups

In the Payroll Class Rates data source, any payroll classes configured to be limited by payroll group are no longer be visible by users whose payroll group isn't permitted to view them. A new Limited to Payroll Groups column displays the names of the payroll groups to which each payroll class has been limited. If the payroll class hasn't been limited to any payroll groups, the column will be blank.

Helm CONNECT API

We made the following changes to the Helm CONNECT API in this release. For more details, please refer to our API documentation (api.helmconnect.com).

Automatically import external readings into Helm CONNECT

We added a new Create Readings (`api/v1/hsqe/CreateReadings`) endpoint that allows you to automatically import readings taken by external systems, such as sensor monitors, into Helm CONNECT. These external readings are available in the following places:

- **Onboard > Logs > Logbook:** When external readings have been posted for the current day, you'll see a new External Readings Posted icon to the right of the date picker. External readings are displayed when you click Show All and are included in PDF reports and CSV exports.
- **Onboard > Logs > History:** External Readings and External Cumulative Readings are new options in the Type filter.
- **Maintenance > Overview > History:** External Readings and External Cumulative Readings are new options in the Type filter.

"ReceivedDate" field added to several endpoints

We added a "ReceivedDate" field to the following endpoints:

- Find Orders (`api/v1/jobs/orders/FindOrders`)
- Create Order (`api/v1/jobs/orders/CreateOrder`)
- Update Order (`api/v1/jobs/orders/UpdateOrder`)

Asset Profiles (`api/v2/public/assetprofiles`)

This is a new endpoint.

Get Corrective Actions (api/v2/public/CorrectiveActions)

This is a new endpoint.

Create/Update Event (api/v1/core/events/CreateOrUpdateEvent)

“SpaceId” is no longer a required field.

Find Assets (api/v1/core/assets/FindAssets)

We added these new fields:

- “TimeZone”
- “AssetProfileId”
- “AssetProfileName”

Get Reading Types (api/v2/public/readingtypes)

This is a new endpoint.

Get Version (api/v1/public/Version)

This is a new endpoint.

Get Readings (api/v2/public/readings)

This is a new endpoint.

Get Tasks (api/v2/public/Tasks)

This is a new endpoint.

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Update Asset (api/v1/core/assets/CreateOrUpdateAsset)

We added these new fields:

- "TimeZone"
- "AssetProfileId"