Release Notes

Version 1.2

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Contents

Enhancements

This release contains the following enhancements.

Platform

This release includes the following platform enhancements for all our subscribers.

Vessel Installations

Upgraded databases
In this release, we upgraded the databases for vessel installations from Microsoft SQL Server Compact (SQL CE) to Microsoft SQL Server Express LocalDB (LocalDB). Once they're on LocalDB, your vessel installations will experience significantly improved speed and performance.

New universal installer
Our new universal installer:

- Allows you to download a single installer to a USB drive and take it to all your vessels. You no longer need a unique installer for each vessel.

- Contains all the files necessary to install Helm CONNECT. Your vessels no longer have to download anything, other than their own data, in order to complete an installation.

- Gives you the option to set up your vessel installations in *Fleet* and provide the vessels with single-use installation keys, or set up your installations directly from the installer while you're on the vessels.

Diagnostic tool
In *Fleet*, we added a new diagnostic tool so you can monitor the progress and status of each vessel installation.

Setup

Multiple divisions
In *Operations*, you now have the option to assign users to one or more secondary divisions, in addition to their default division.

Concurrency handling for set up data
If two or more users are making changes to the same set up data, they will now see a notification that someone else is also editing the data. If one user updates the data, the other user will have the option to refresh the page to see the other user's changes. Concurrency handling is currently available in the following setup modules:

- In *Operations*, on the Divisions and Custom Fields tabs.

- In *Users*, on the Users, Roles, and Positions tabs.

- In *Locations*, on the Locations and Location Types tabs.

- In *Fleets* on the Fleets tab.

Reports

Report builder now available to all subscribers
The report builder on the Reports tab now includes data sources for management, certifications, maintenance, compliance, and some set up areas, and has been made available to all our subscribers.

Enhanced design for the report builder
We redesigned the layout of the report builder and added several useful new tools:

- The new layout makes it easier to select the columns you want to include in your report.

- To save you time, we added default columns for the Jobs and Setup reports. You can either use a report with the default columns, or you can easily customize it by adding or deleting columns.

- You can now share a report you've built with other users.

- You can now export a report as a PDF document.

Maintenance

This release includes the following enhancements for our Maintenance subscribers.

Onboard

More detailed information for finished tasks
On the History tabs in *Logs* and *Overview*, detailed views for finished tasks now clearly show the type of task (i.e., checklist, inspection, form, or task). If applicable, they also show the specific templates that were the source of each task.

Maintenance

More detailed information for finished tasks
On the History tab in *Overview*, detailed views for finished tasks now clearly show the type of task (i.e., checklist, inspection, form, or task). If applicable, they also show the specific templates that were the source of each task.

Management

New parts data source for custom fields
On the Details tabs in *Assets* and *Personnel*, we added a new parts data source for custom fields that use either a single or multi-select control.

Reports

Report on overdue items
When building a report from the tasks data source, you now have the option to include a column to show whether or not any items are overdue now, were overdue at any point, or were overdue upon completion.

Setup

Control who can add new tasks
In *Users*, you can now control which roles have permission to add a new task in *Logs* or *Overview*. You'll find the new Add New Task checkbox on the Roles tab, in the Settings group

under Maintenance.

Generate tasks from failed items on forms
In *Templates*, if you're also a Forms or Compliance subscriber, you now have the option to choose which Pass/Fail items in a form template will generate a task from a failed item.

More options for custom fields on tasks
In *Tasks*, we renamed the Task Configuration tab to Task Custom Fields, and added two new tabs:

- On the Task Fields Configurations tab, you can now control whether any custom field you add on the Task Custom Fields tab is hidden or displayed in your task windows. You can also control whether the default Tags, Component, and Location fields are hidden or displayed in your task and corrective action windows.

- On the Task Number Rules tab, you can configure rules for unique, system-generated identification numbers to be displayed on tasks.

Compliance

This release includes the following enhancements for our Compliance subscribers.

Setup

Add notes and attachments to forms
In *Templates*, you can now add notes and attachments to a form template. These notes and attachments will also be included on any forms based on the template.

Generate tasks from failed items on forms
In *Templates*, if you're also a Maintenance subscriber, you now have the option to choose which Pass/Fail items in a form template will generate a task from a failed item.

Create records of attendance from forms
In *Templates*, if you include the Crew Selection item on a form template, you can now choose whether it will add a record of attendance to each selected crew member's personnel record. If you're also a Certifications or Personnel subscriber, you can view personnel records on the History tab and sub tab in *Personnel*.

More options for custom fields on corrective actions
In *Tasks*, we renamed the Task Configuration tab to Task Custom Fields, and added two new tabs:

- On the Task Fields Configurations tab, you can now control whether any custom field you add on the Task Custom Fields tab is hidden or displayed in your corrective action windows. You can also control whether the default Tags, Component, and Location fields are hidden or displayed in your task and corrective action windows.

- On the Task Number Rules tab, you can configure rules for unique, system-generated identification numbers to be displayed on corrective actions.

Jobs

This release includes the following enhancements for our Jobs subscribers.

Dispatch

Request missing locations, customers, or agents
On the Trips tab, while adding or editing an order, you can now request that a missing location, customer, or agent be added to the system. Users with permission to the Request Manager can then approve or decline the request.

Enhancements to the resource planner
We added several enhancements to the resource planner:

- You can now use the filters to show resources by operating area, instead of by division.
- We restyled the date filters to make them easier to see, and added a new date filter for +/- Month.
- By hovering over a time bar in the planner, you can now see a tooltip with more details about the job.
- We moved the More Actions icon from inside each time bar. It's now to the right of each time bar.

Trip dates and times from the vessel automatically updated on shore
If a trip start date and time or end date and time are logged in *Logs* onboard one of your vessels, the dates and times will automatically be updated on the Trips tab and in the resource planner on shore.

Tariffs and Contracts

Deactivate or duplicate tariffs
You now have the option to deactivate a tariff that isn't currently being used. If necessary, you can reactivate the tariff again. You also now have the option to duplicate a tariff.

Valid rate table conditions not cleared out
When setting up a rate table for a tariff or contract, if you change the type of rate table (for example, Per Order or Per Trip), any valid conditions you've already entered will remain.

Customize columns in the Contracts list view
On the Contracts tab, you now have the option to customize the columns shown in the list view. You can select which columns to hide or show as well as change the order of the displayed columns.

View contract details for a parent division
On the Contracts tab, you can now view the details of contracts in a parent division, although you can't edit them.

Option to apply surcharges after discounts
When adding a surcharge to a tariff or contract, you now have the option to apply that surcharge after any discounts.

Billing

Control who can print final invoices
You can now control which users have permission to print final invoices. If a user doesn't have this permission, any invoices they print will bear the watermark "For Internal Use Only."

Percentage-based charges updated automatically
On the Overview tab, when you edit a transaction line, any percentage-based charges that reference that line will now be updated automatically.

Preview email list for selected transactions
On the Transactions tab, before you email a selected transaction, you now see a preview of the people who will receive the email. You also have the option to cancel the email if you don't want to send it to the people on the list.

Status filter includes posted transactions
On the Transactions tab, the Status filter now includes the option to show transactions with a status of "Posted."

Setup

Concurrency handling for Jobs data
If two or more users are making changes to the same set up data, they will now see a notification that someone else is also editing the data. If one user updates the data, the other user will have the option to refresh the page to see the other user's changes. Concurrency handling is currently available in the following Jobs-related set up modules:

- In *Ships*, on the Cargo Types and Tracking Systems tabs.

- In *Orders*, on the Trip Types, Order Configurations, Resources, and Cancellation

Reasons tabs.

- In *Events*, on the Event Types and Activity Types tabs.

Additional control over billing options
On the Billing Settings tab in *Invoicing*, a new contract billing option called Customer Con-tract Billing Only will prevent the system from using an agent's contract.

Reports

Tags filter in Event Logs report
The Event Logs report now includes the option to filter the data by tags.

Fuel price included in reports with revenue
All reports that include revenue now also include the fuel price.

Certifications

This release includes the following enhancements for our Certifications subscribers.

Onboard
- In *Crew*, you can now search for specific crew members by name.

Management
- For both *Assets* and *Personnel*, you can now add certifications obtained as far back as seventy years.