Release Notes

Version 1.28

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Revision: 7

Contents

Introduction

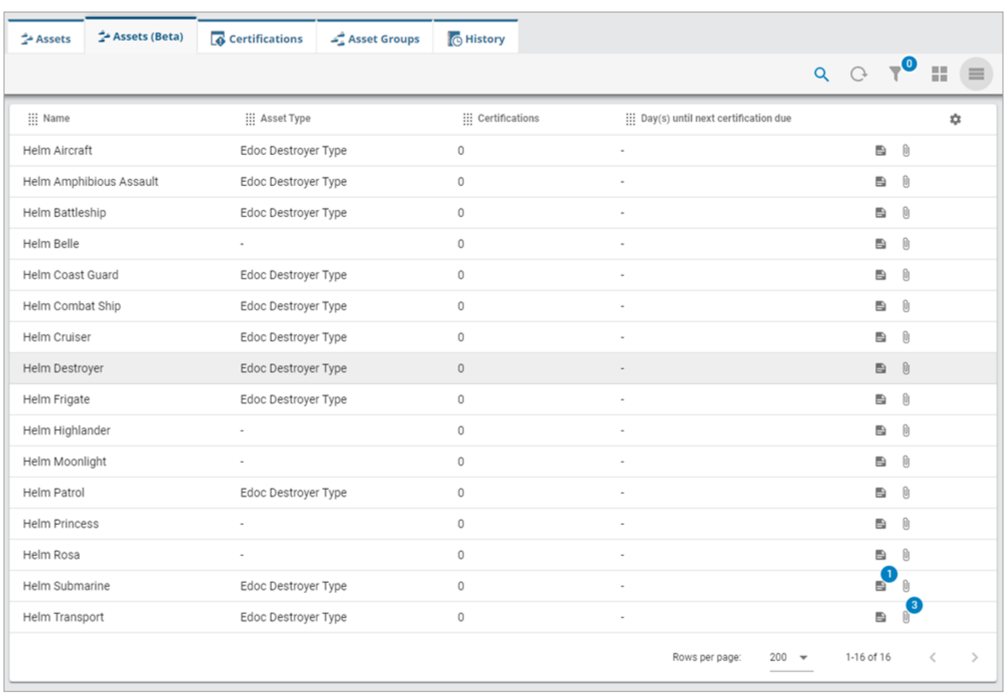
Welcome to Version 1.28 of Helm CONNECT.

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.

See More of Your Data at Once

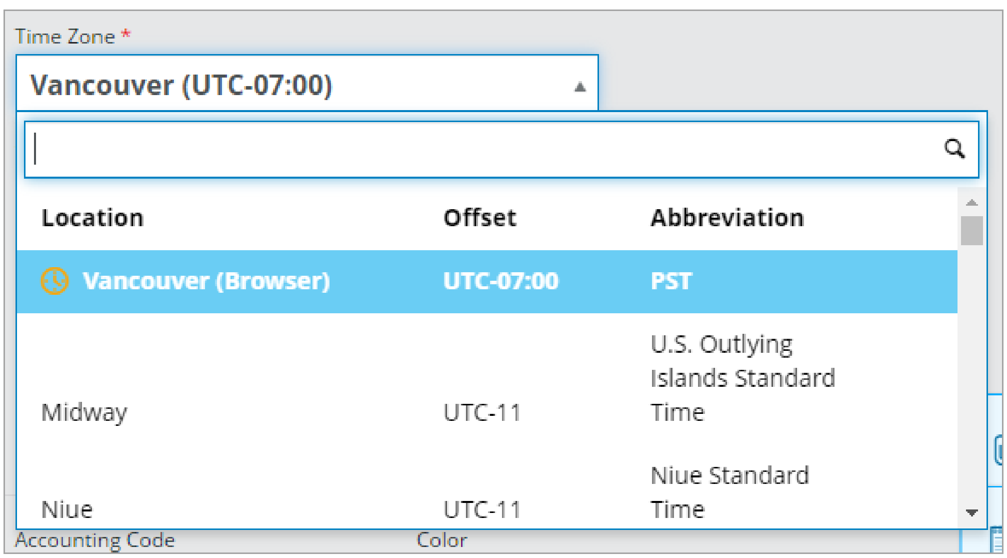
Based on valuable feedback and suggestions we received from our early adopters, we continued to improve two of our pre-release features: the Management > Assets > Assets (Beta) tab and the Maintenance > Overview > Advanced Search (Beta) tab. Customers said they love the clean, modern look and abundance of filtering options on these new tabs but want to see even more of their data at once. We're introducing a more condensed layout for the list views on both tabs and the associated Attachments windows. Please get in touch with your account manager if you'd like to see a demo of the Assets (Beta) and Advanced Search (Beta) tabs or want to try them out for yourself.



Configure Time Zones With Ease

We added several changes to make it faster and easier to configure time zones, especially for our customers whose work spans more than one time zone:

- **Use the suggested time zone**: In many cases, the time zone you need is the same as your web browser's current time zone, so we now display it at the top of each list time zone list accompanied by a clock icon and the label "Browser" in brackets behind its name.
- **See more information at a glance**: Until now, we've only displayed the locations and the offsets to Coordinated Universal Time (UTC) in our Time Zone lists. To make it easier to know which time zones you're looking at, we added the more familiar and commonly used abbreviations for each time zone, such as PST for Pacific Standard Time.
- **Search for the time zone you need**: Instead of just scrolling through a long list of available list of time zones, you can now search for the time zone you need by its location, its offset to UTC, or its abbreviation. If you'd still prefer to scroll, we made it easier by ordering the list of time zones by offset to UTC instead of by location.



Abandoned Installations Will Expire

To help you manage your installations and their databases, we added a new "Expired" status on the Setup > Fleet > Fleet Installations tab. For an installation to expire, it must meet all of the following conditions:

- It must be four or more versions older than the current version of Helm CONNECT. For example, if the current version is 1.28, an expired installation would be on 1.24 or earlier.
- It must not have not contacted shore in over a month.
- It must not already have a status of "Uninstalled."

Although you aren't required to delete an expired installation from the Fleet Installations tab, it will no longer be able to transfer data and you won't be able to rebuild its databases.

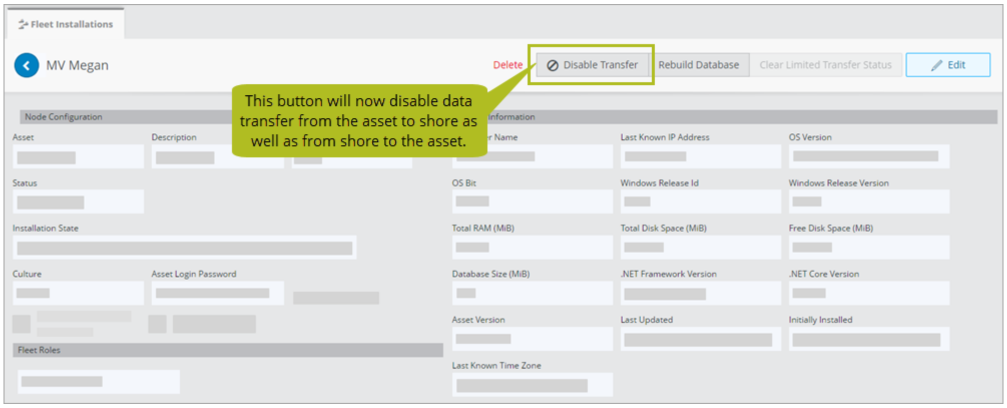
Crew Will See a Warning if Their Asset Installation Has Been Deleted on Shore

If you delete an installation from the Setup > Fleet > Fleet Installations tab and haven't yet uninstalled it from the asset where it's being used, the crew will see now a message that their installation is no longer active and they should contact their system administrator for help.

We strongly suggest you uninstall Helm CONNECT from an asset before deleting its corresponding installation from the Fleet Installations tab. Once an asset has been deleted, the crew won't be able to sync any data that hasn't yet been sent to shore. Please see this article for more about uninstalling Helm CONNECT.

Disable Data Transfer from Assets to Shore

Previously, the Disable Transfer button on the Setup > Fleet > Fleet Installations tab would only disable data transfer from shore to the asset. Now, this button will also disable data transfer from the asset to shore.

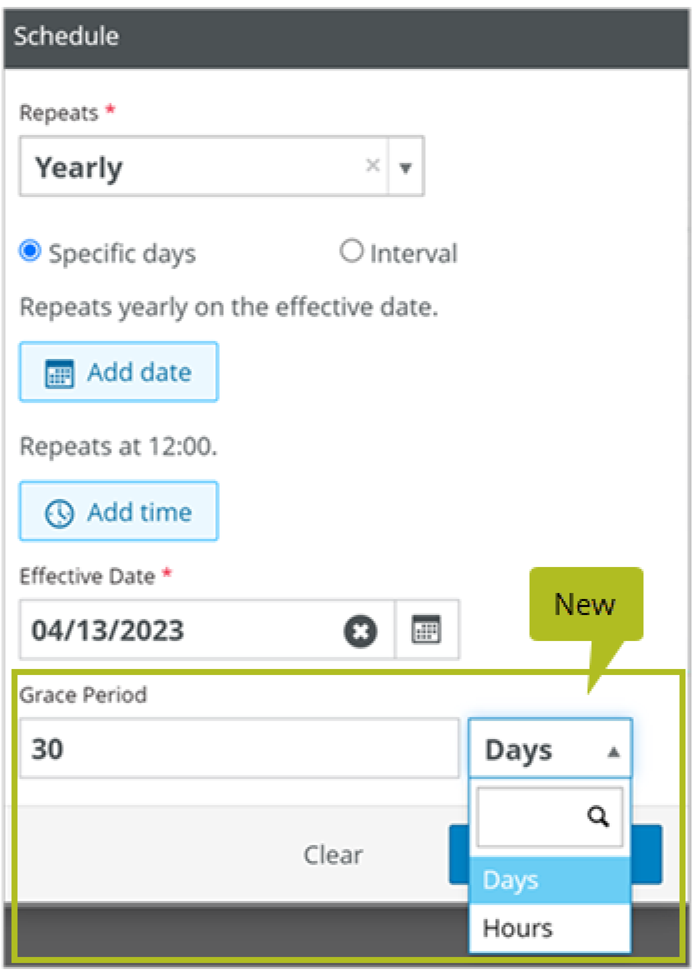

Fleet Installations
MV Megan
Delete
Disable Transfer
Rebuild Database
Clear Limited Transfer Status
Edit
This button will now disable data transfer from the asset to shore as well as from shore to the asset.
Node Configuration
Asset
Description
Status
Installation State
Culture
Asset Login Password
Fleet Roles
Last Known IP Address
OS Version
OS Bit
Windows Release Id
Windows Release Version
Total RAM (MiB)
Total Disk Space (MiB)
Free Disk Space (MiB)
Database Size (MiB)
.NET Framework Version
.NET Core Version
Asset Version
Last Updated
Initially Installed
Last Known Time Zone

Helm CONNECT Maintenance

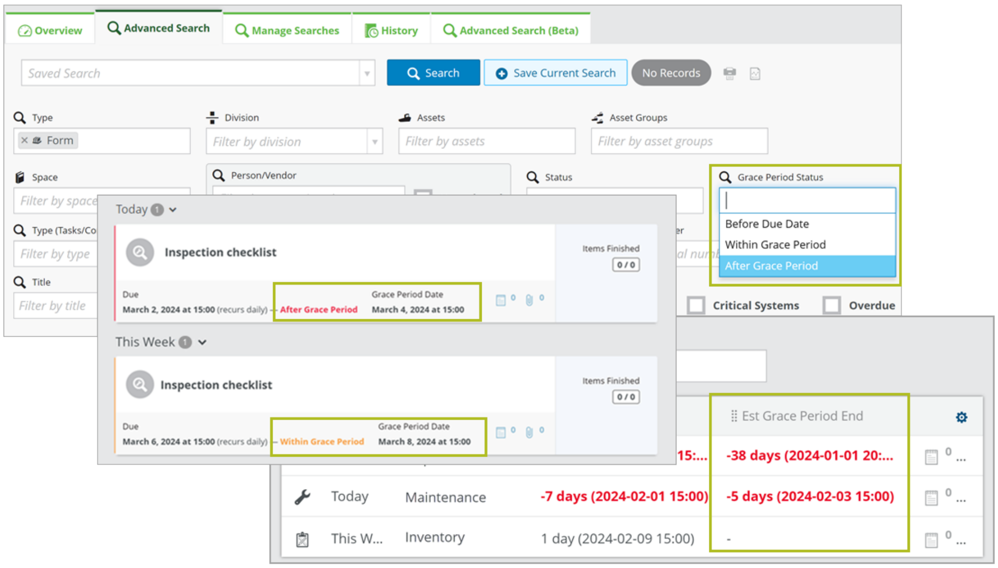
We made the following changes to Helm CONNECT Maintenance in this release.

Add Grace Periods to Your Checklists

You can now add grace periods to the due dates for your inspection, maintenance, and inventory checklists. On the Inspections, Maintenance, and Inventory tabs under Setup > Templates, we added a new Grace Period option to the Schedule window.

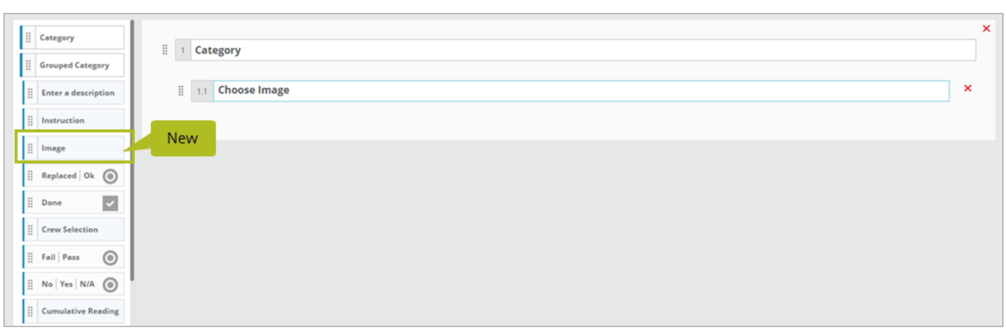


We added visual cues, columns, and filters for grace periods throughout Onboard > Logs and Maintenance > Overview so you can easily manage your work and see how items are doing relative to their grace periods.



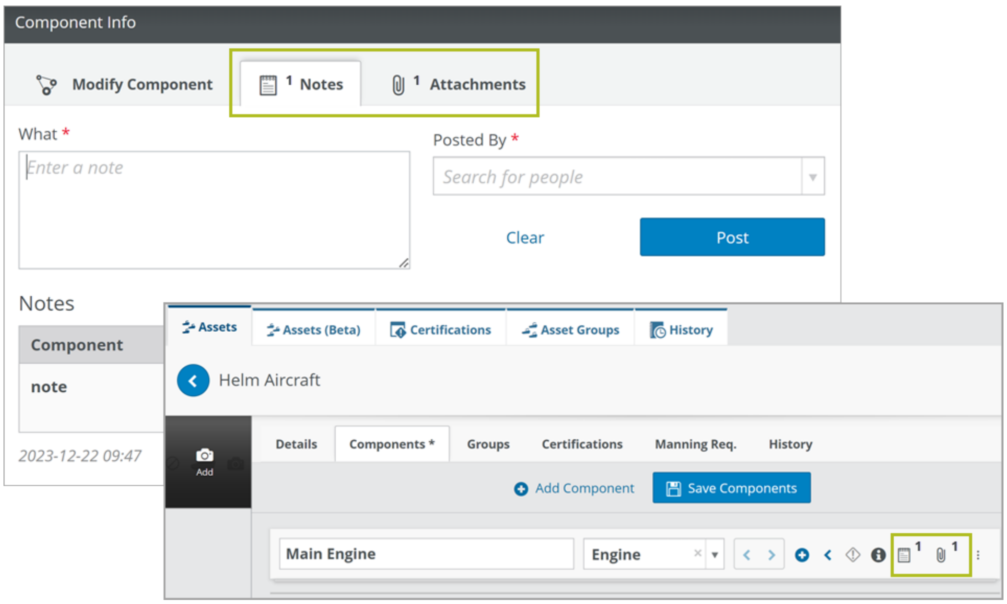
Embed Images in Your Checklists

We added a new Image option to inspection, maintenance, and inventory templates so you can embed images right in your checklists and make them look more like their paper counterparts. Once you add images to a template, they'll be visible in any checklists based on that template, including in history, print previews, and when you print. They'll also be included if you duplicate the original checklist template.



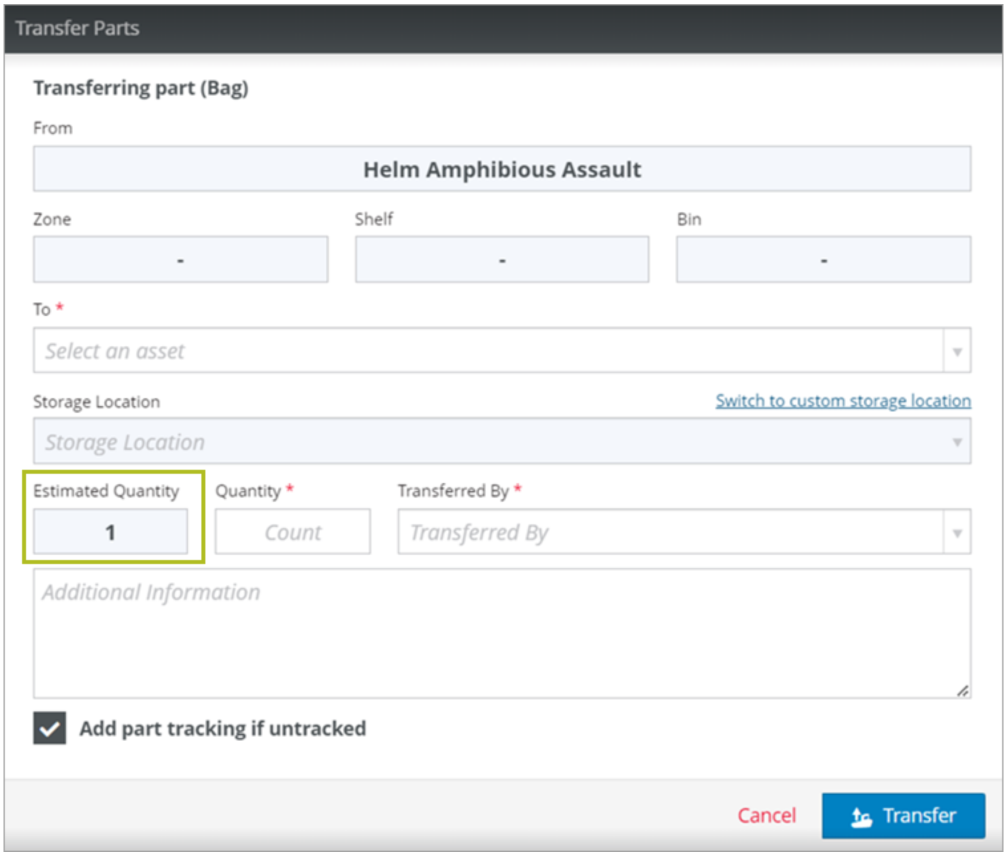
Add Notes and Attachments to Components

In the Component Info window, we added two new tabs that allow you to add notes and attachments to your components. Notes and attachments will move with a component if it's transferred to another asset or location.



See How Many Parts an Asset Has on Hand Before Transferring Them

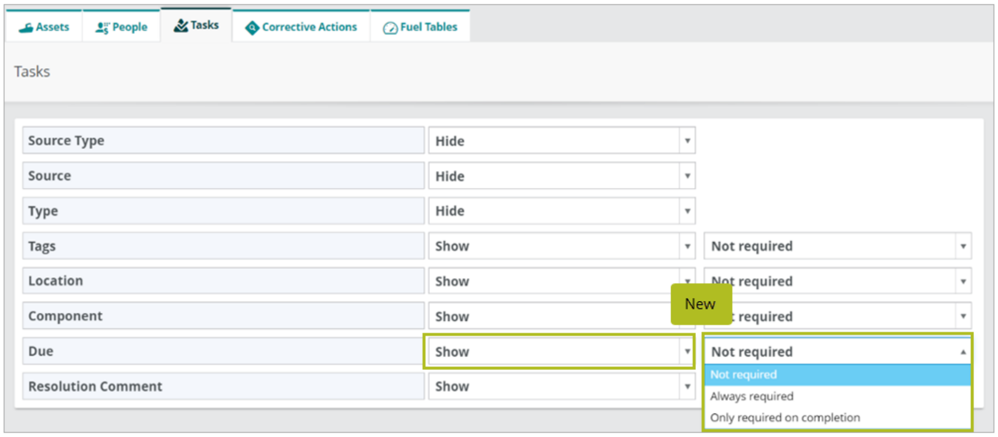
We added a new Estimated Quantity field to the Transfer Parts window so you can quickly see how many of a particular part an asset has on hand before transferring them to another asset.



Configure the Due fields for Tasks

Until now, filling in the due dates and times on tasks was always optional, and there was no way to hide the fields if you didn't need them. To give you more control and help you ensure that all work is properly scheduled and accounted for, we made the Due fields configurable. From the Tasks tab under Setup > Field Configurations, you can now hide or show the Due fields and choose from these three requirement options:

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



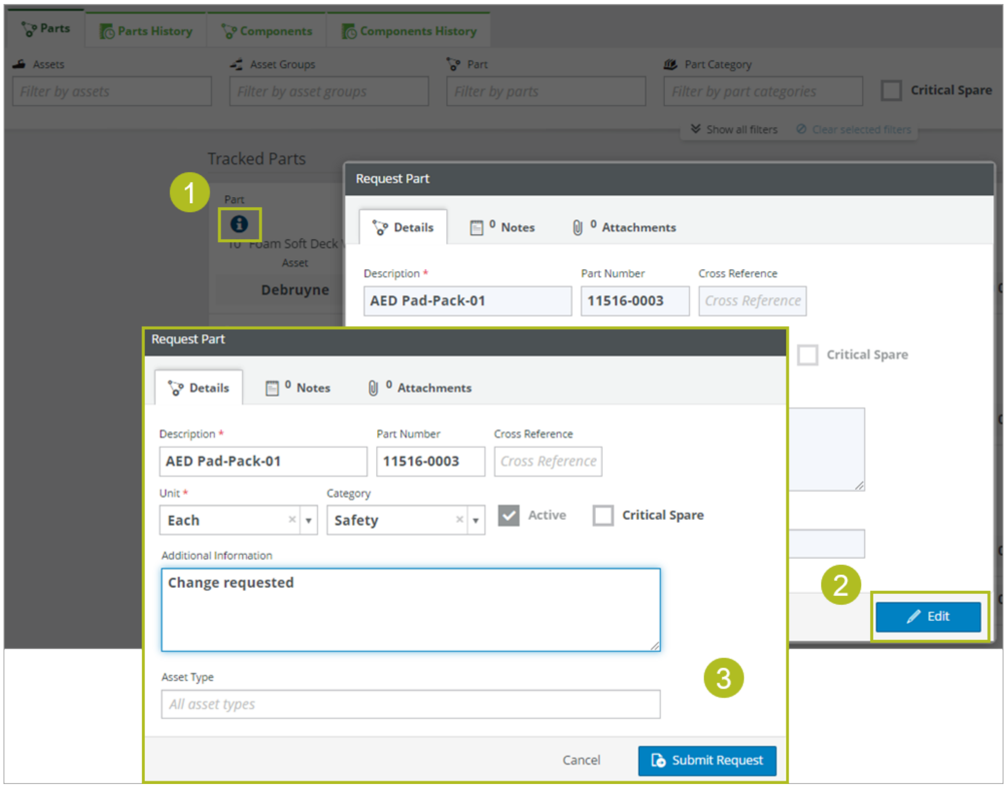
Add Clickable Hyperlinks to Your Checklists

You can now add URLs to any text field in an inspection, maintenance, or inventory template. When you publish the template, the URLs will become clickable links that open in a new browser window. Anyone filling in checklists based on that template will also see the links. Your end users can also add URLs directly to any text field in a checklist, and they will become clickable once the checklist is submitted, including when it moves to history. Links can go to other locations within Helm CONNECT or to internal or external websites.

Request Parts From the Inventory Tab

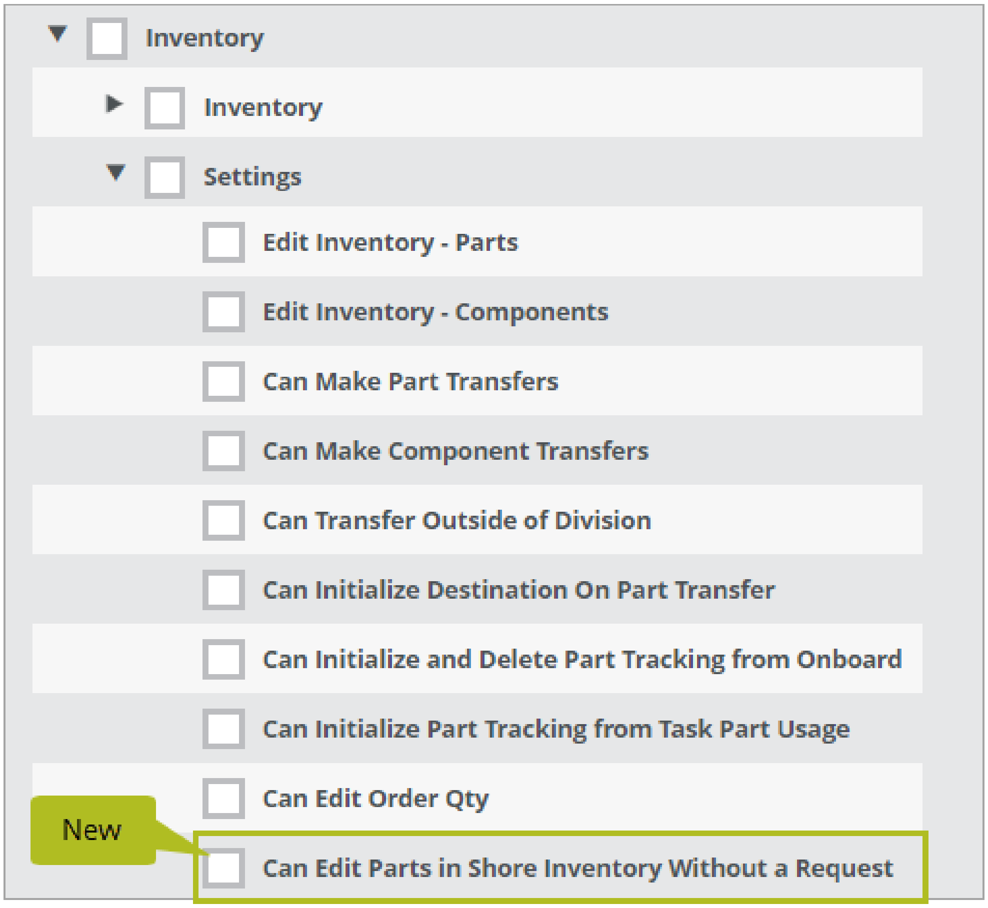
You can now allow specific users to request changes to your master parts list right from the Inventory > Inventory > Parts tab or the Onboard > Inventory > Parts tab. When they click the Part Information icon to see more about a part, users with the two following permissions will now see a Request Part window where they can enter the changes they need and submit them for approval:

- Inventory > Settings > Edit Inventory
- Setup > Request Manager > Request > Parts



Edit Parts From the Inventory Tab

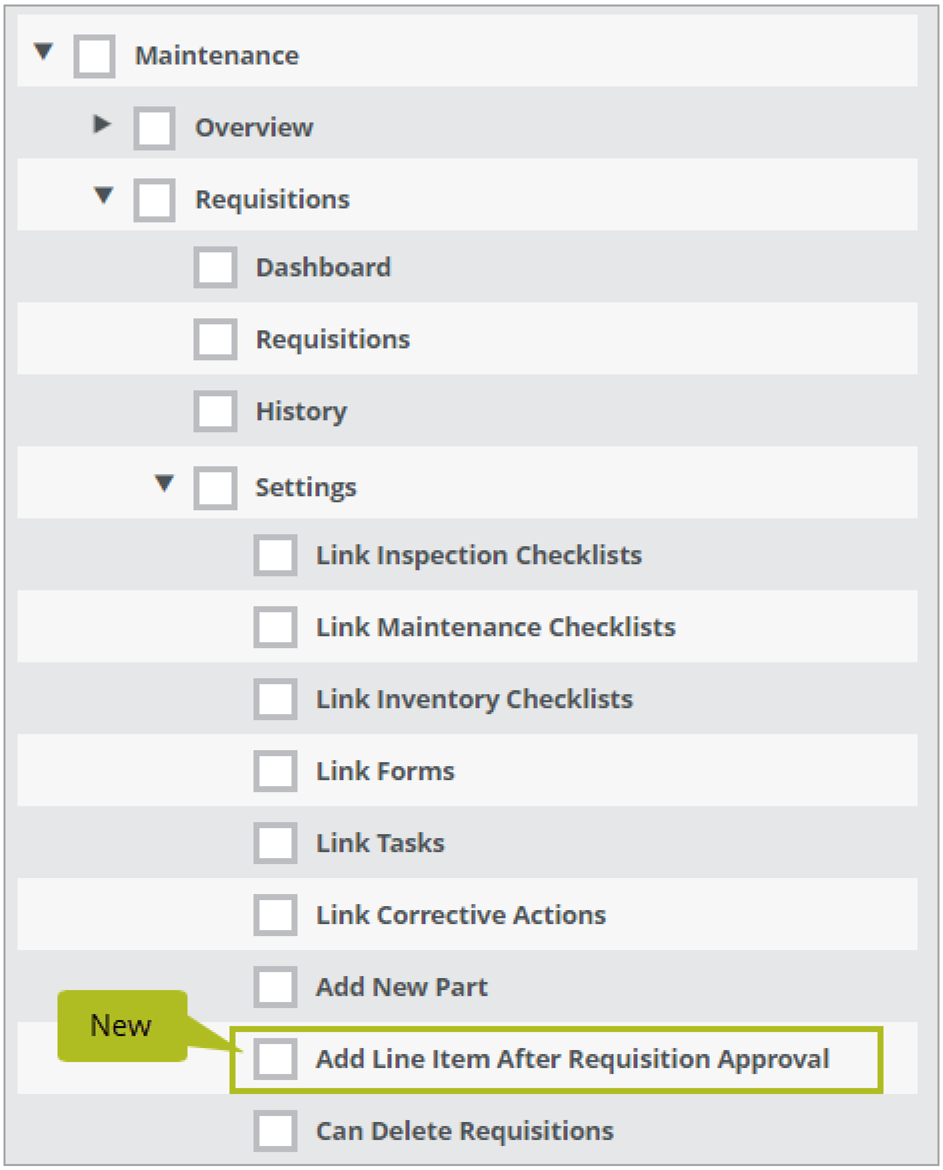
We added a new permission under Inventory > Settings called “Can Edit Parts in Shore Inventory Without a Request” so you can allow specific users to make changes to your master parts list right from the Inventory > Inventory > Parts tab or the Onboard > Inventory > Parts tab without submitting a request for approval. When they click the Part Information icon to see more about a part, users with the new permission will now see an Edit Part window where they make the changes they need.



Anyone whose role currently includes the Setup > Request Manager > Request > Parts permission will automatically receive the new permission after the upgrade to Version 1.28. If you'd rather someone not have the permission you must manually remove it from their role. In addition, the new permission is not available to users working on an asset installation.

Control Who Can Change Requisitions After They've Been Approved

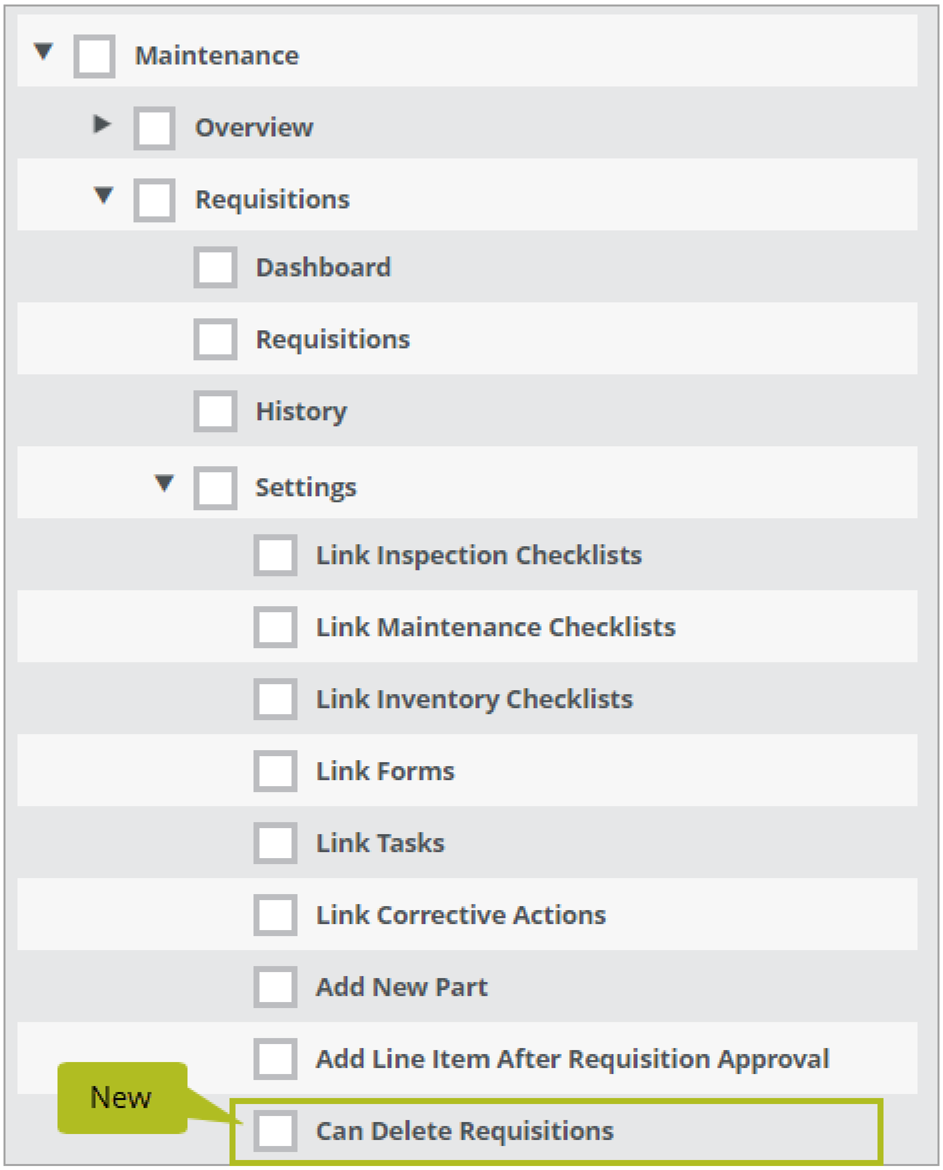
We added a new permission under Maintenance > Requisitions > Settings called Add Line Item After Requisition Approval so you can control who can change requisitions after they've been approved. Previously, any user could keep adding new line items to approved requisitions and send them for reapproval. By limiting this behavior to specific users, you can promote best practices and require your crew to create new requisitions when necessary instead of adding more items to ones already approved and ordered.



Anyone whose role currently includes the Onboard > Requisitons > Requisitions or Maintenance > Requisitions > Requisitions permission will automatically receive the new permission after the upgrade to Version 1.28. If you'd rather someone not have this permission you must manually remove it from their role.

Control Who Can Delete Requisitions

We added a new permission under Maintenance > Requisitions > Settings called Can Delete Requisitions so you can control who can delete requisitions. Previously, any user could delete a requisition. Now, if a user doesn't have the Can Delete Requisitions permission, they will not see the Delete button.

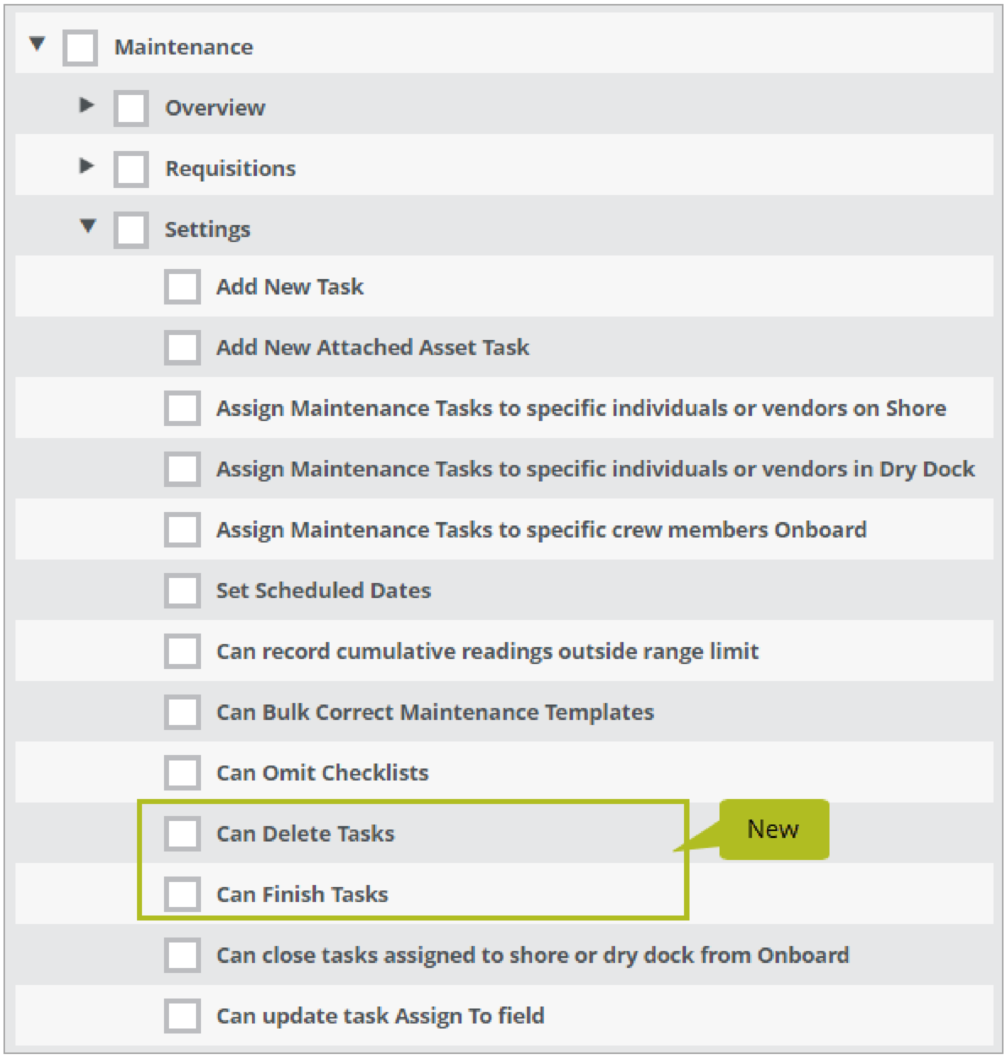


Anyone whose role currently includes the Onboard > Requisitons > Requisitions or Maintenance > Requisitions > Requisitions permission will automatically receive the new permission after the upgrade to Version 1.28. If you'd rather someone not have the permission you must manually remove it from their role.

Control Who Can Finish and Delete Tasks

We added two new permissions under Maintenance > Settings called "Can Finish Tasks" and "Can Delete Tasks" to give you more control over who can finish and delete tasks. Users without the "Can Finish Tasks" permission will no longer see the Finish button, and users without the "Can Delete Tasks" permission will no longer see the Delete button.

> **NOTE**
> To finish a task from Onboard > Logs that has been assigned to either Shore or Dry Dock, a user must have both the new "Can Finish Tasks" permission and the existing "Can close tasks assigned to shore or dry dock from Onboard" permission.



Anyone whose role currently includes one of these permissions will automatically receive the “Can Finish Tasks” permission after the upgrade to Version 1.28:

- Onboard > Logs > (any space)
- Onboard > Logbook > Logbook
- Onboard > Overview > To Do
- Maintenance > Overview > Advanced Search > Settings > Tasks > Edit

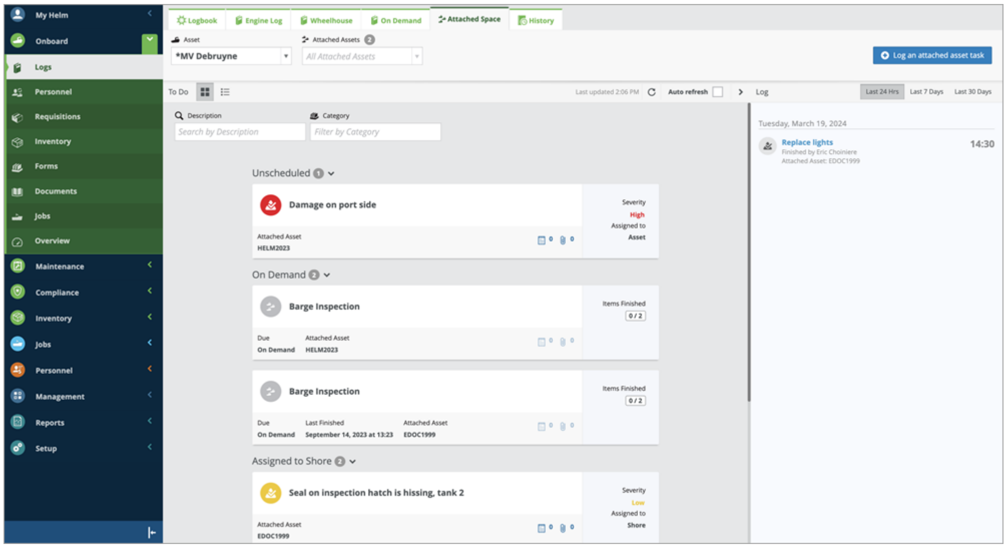
Anyone whose role currently includes one of these permissions will automatically receive the “Can Delete Tasks” permission after the upgrade to Version 1.28:

- Onboard > Logs > (any space)
- Onboard > Logs > History
- Onboard > Logbook > Logbook
- Onboard > Overview > To Do
- Maintenance > Overview > Advanced Search > Settings > Tasks > Edit
- Maintenance > Overview > History
- Maintenance > Settings > Add New Task

NOTE
If you'd rather someone not have these permissions you must manually remove them from their role.

Manage the Maintenance for Attached Assets

We're introducing a powerful new tool set to Helm CONNECT Maintenance for attached assets, such as barges. New tasks and checklists will work seamlessly with your existing maintenance work flows and a dedicated work space in Onboard > Logs will provide transparency to your crew and shore-based teams, ensuring the maintenance data for your attached assets is both centralized and able to travel with them.



NOTE

The new tools and features for attached assets won't be turned on by default when you upgrade to Version 1.28. Please reach out to your account manager for information and to discuss pricing options.

Improvements to the Advanced Search (Beta) Tab

We introduced the Advanced Search (Beta) tab as a pre-release feature in Version 1.26 of Helm CONNECT. In this release, we added several improvements based on valuable feedback and suggestions from interested customers:

- We improved the way the calculation in the Est Due In field works to provide you with a more accurate estimate.
- We now display just the first five rows of your search filters and added a scroll bar so you can view the additional rows. We also gave you the option to expand or collapse your filters.
- You can now rearrange the columns in the list view by dragging them to new positions. You can also add asset and task custom fields to your columns.

- You can now expand or collapse the icon columns. When expanded, they'll be "sticky" which means they'll remain visible when you scroll to the left or right.
- We made the header and footer "sticky" so they're always visible when you scroll up or down.
- We added a Column Settings icon (shaped like a gear) to the top right of the table so you can decide which columns to hide or show, including columns based on custom fields added to your tasks.
- Any changes you make to your settings will be remembered the next time you log in.

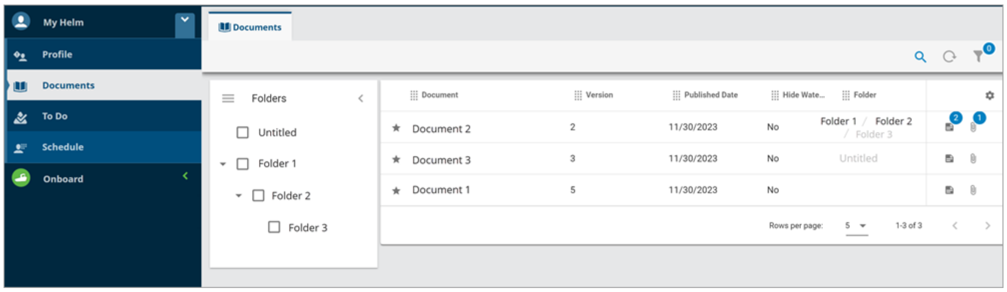
Please reach out to your account manager if you'd like to see a demo of the Advanced Search (Beta) tab or want to try it out for yourself.

Helm CONNECT Compliance

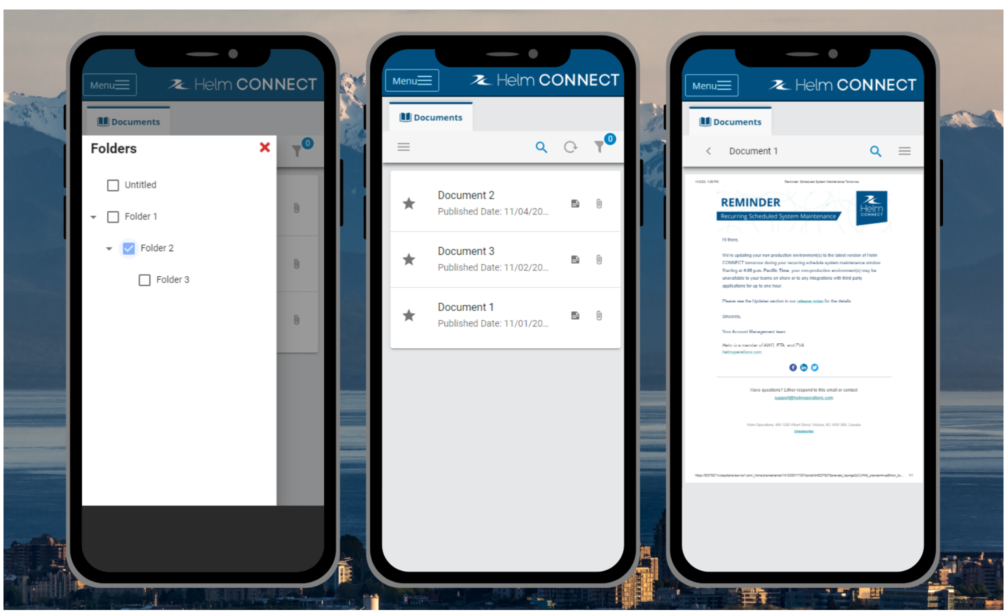
We made the following changes to Helm CONNECT Compliance in this release.

Mobile-Friendly Documents for Your Crew

We added a new My Helm > Documents > Documents tab so your crew can now read and acknowledge all their documents from My Helm.

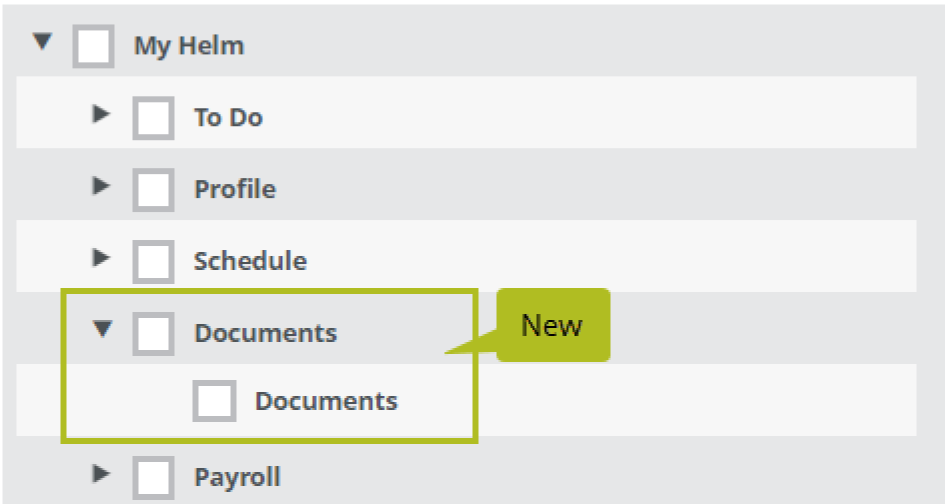


The new Documents tab is optimized for both desktop and mobile viewing so your crew can easily access any documents they need right from their phones or other mobile devices.



Manage Who Can Access Documents from My Helm

Under My Helm, we added a new Documents > Documents permission so you can manage which users have access to the new My Helm > Documents > Documents tab.



Anyone whose role currently includes at least one of these permissions will automatically receive the new permission after the upgrade to Version 1.28:

- Onboard > Documents > Library
- Compliance > Documents > Library
- Compliance > Documents > Document Control

NOTE
If you'd rather someone not have the permission you must manually remove it from their role.

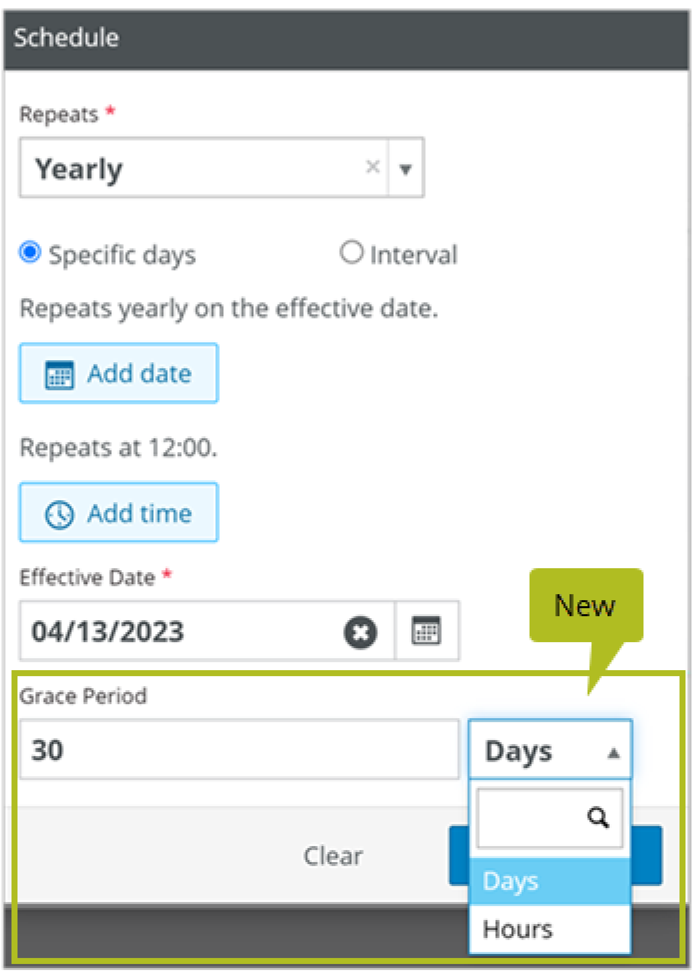
See a Pre-Release Version of a Mobile-Friendly Document Library

We're also working on mobile-friendly versions of the Onboard > Documents > Library and Compliance > Documents > Library tabs called Library (Beta). They're available now to interested customers, so please reach out to your account manager if you'd like some more information or would like to see a demo of these exciting new features.

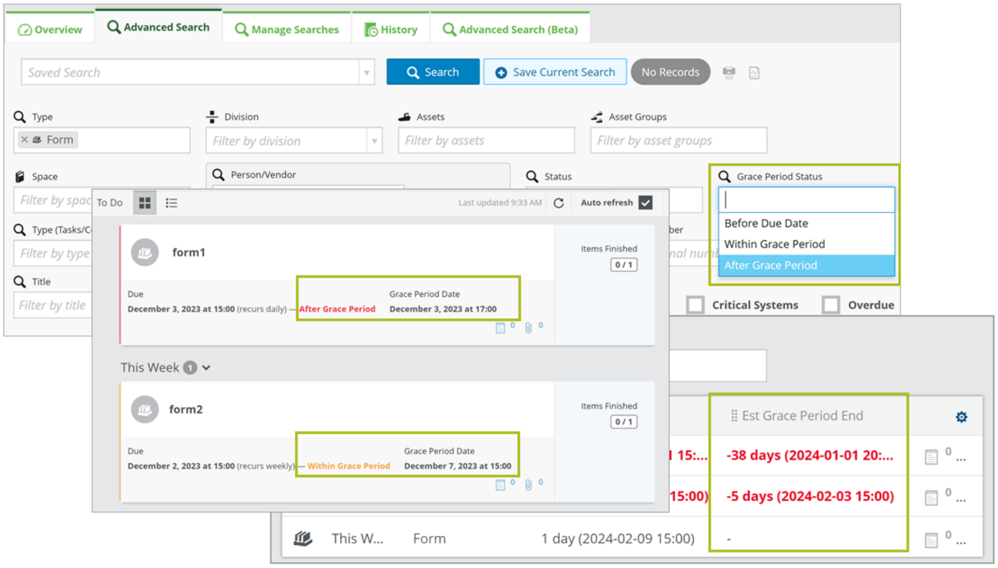
Add Grace Periods to Your Form Schedules

You can now add grace periods to the due dates for your forms. On the Setup > Templates > Form tab, we added a new Grace Period option to the Schedule window.

NOTE
You can't apply grace periods to shore-only or on-demand forms.

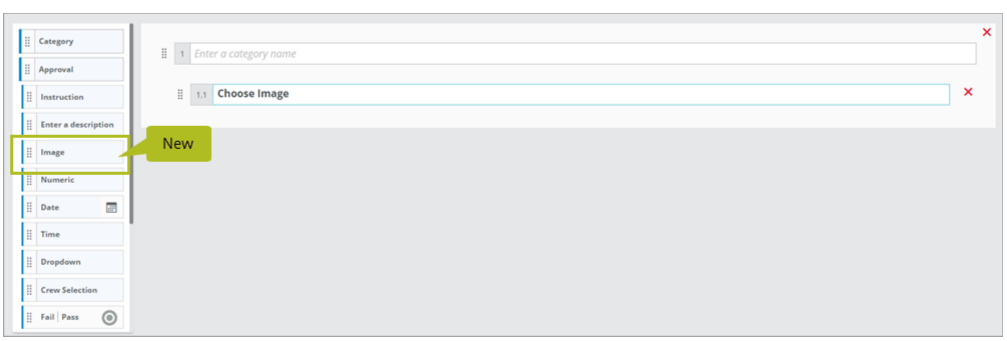


We added visual cues, columns, and filters for grace periods throughout Onboard > Logs, Maintenance > Overview, and Compliance > Audits so you can easily manage your work and see how items are doing relative to their grace periods.



Embed Images in Your Forms

We added a new Image option to forms templates so you can embed images right in your forms and make them look more like their paper counterparts. Once you add images to a template, they'll be visible in any forms based on that template, including in history, print previews, and when you print. They'll also be included if you duplicate the original form template.



New Character Limit for Observations and Findings

There's good news for anyone who thought the character limit for observations and findings on audits was a little low. We more than doubled the limit by increasing it from 400 to 1000 characters.

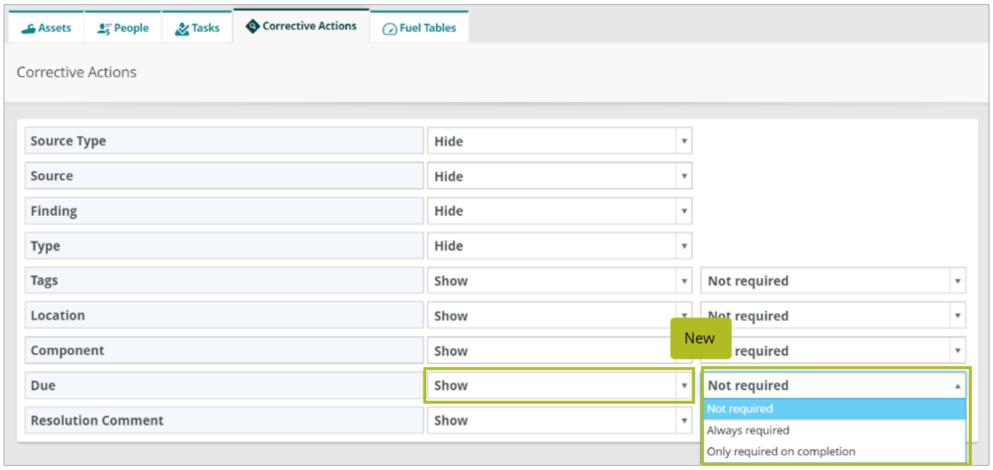
Include Assignees and Vendors on the Same Corrective Actions

You can now include an assignee and a vendor on the same corrective action. This makes things easier when you want to assign an internal resource to work alongside an external vendor.

Configure the Due Fields for Corrective Actions

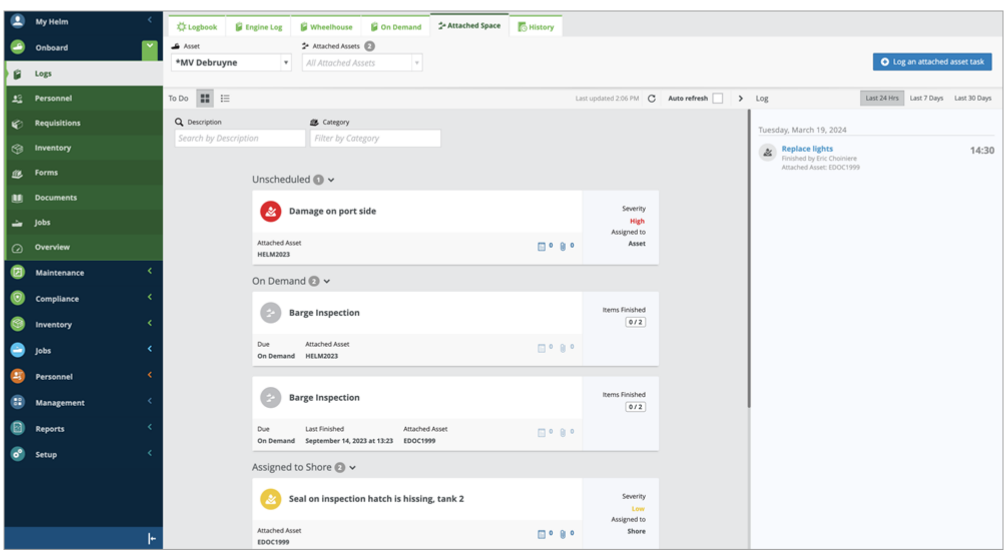
Until now, filling in the due dates and times on corrective actions was always optional, and there was no way to hide the fields if you didn't need them. To give you more control and help you ensure that all work is properly scheduled and accounted for, we made the Due fields configurable. From the Corrective Actions tab under Setup > Field Configurations, you can now hide or show the Due fields and choose from these three requirement options:

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



Manage the Compliance for Attached Assets

We're introducing a powerful new toolset to Helm CONNECT Compliance for attached assets, such as barges. New forms and certifications will work seamlessly with your existing compliance workflows and a dedicated work space in Onboard > Logs will provide transparency to your crew and shore-based teams, ensuring the compliance data for your attached assets is both centralized and able to travel with them.



NOTE

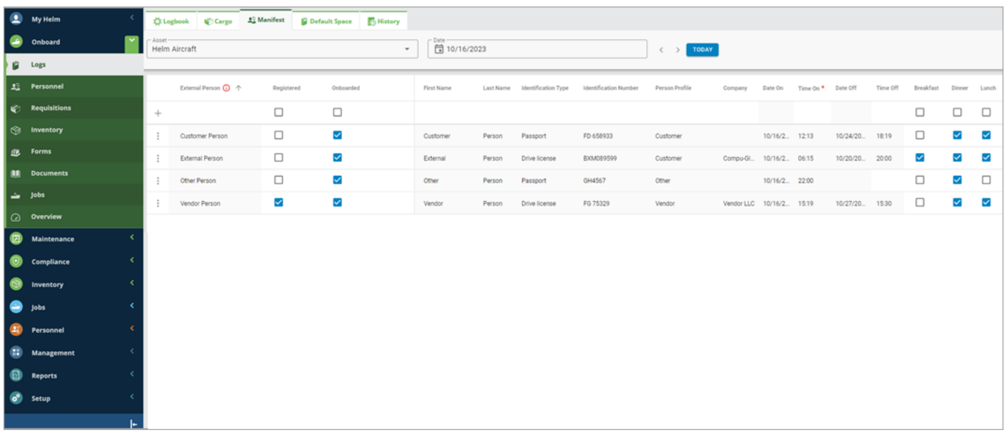
The new tools and features for attached assets won't be turned on by default when you upgrade to Version 1.28. Please reach out to your account manager for information and to discuss pricing options.

Helm CONNECT Jobs

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

Introducing the Manifest Module

Our new Manifest module allows you to manage, track, and report on the activities and services related to passengers—such as customers, vendors, and other non-employee individuals—who come onboard your vessels. From a dedicated Manifest tab in Onboard > Logs, you'll be able to easily create and update passenger profiles, as well as onboard and offboard passengers and track their daily meals and accommodations.

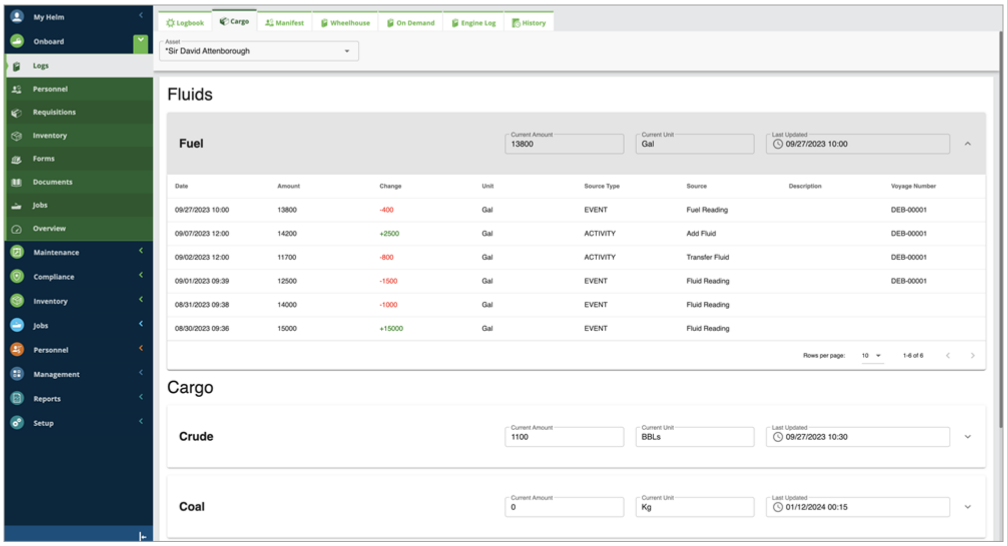


NOTE

The new Manifest module won't be turned on by default when you upgrade to Version 1.28. Please reach out to your account manager for information.

Track Cargo and Fluids with the Logbook Module

Cargo and Fluid Tracking is a new set of add-on features for the Logbook module that allow you to monitor, track, and report on transactions for dry and liquid cargo and the consumable fluids onboard your vessels from a dedicated Cargo tab in Onboard > Logs.

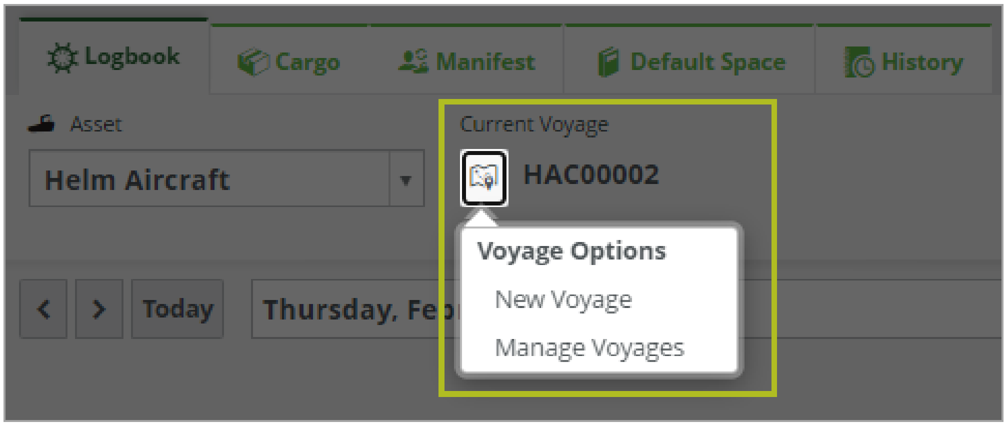


NOTE

The new add-on Cargo and Fluid Tracking features won't be turned on by default when you upgrade to Version 1.28. Please reach out to your account manager for information.

Manage Voyages with the Logbook Module

Voyages is a new set of add-on features for the Logbook module that allow you to create groups of logbook entries or "voyages" and manage, bill for, and report on everything related to those voyages. If you also subscribe to the new Manifest module and the new add-on Cargo and Fluid Tracking features, then manifest details and cargo and fluid information can also be associated with voyages and combined in your reports.

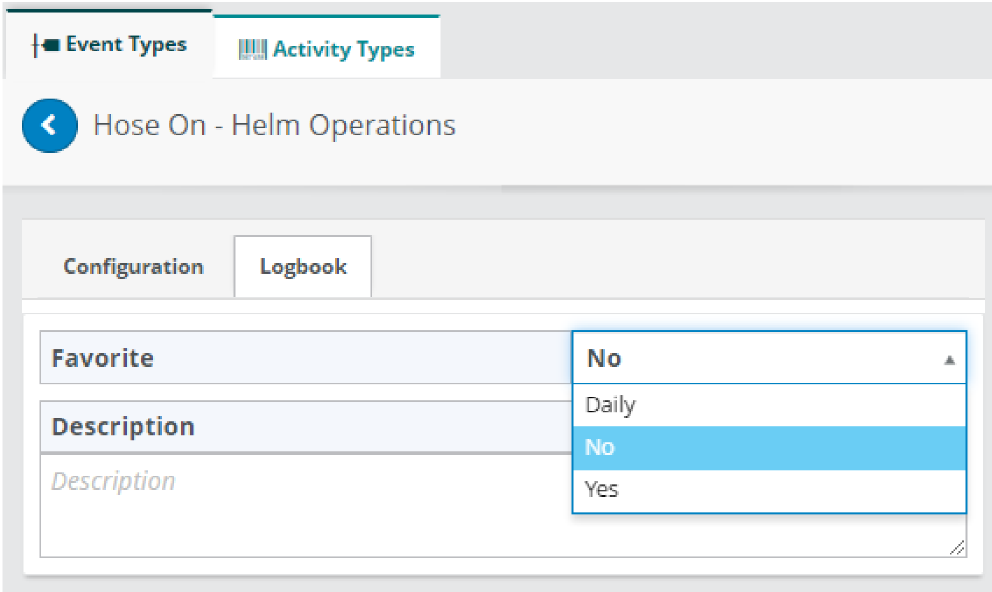


NOTE
The add-on Voyages won't be turned on by default when you upgrade to Version 1.28. Please reach out to your account manager for information.

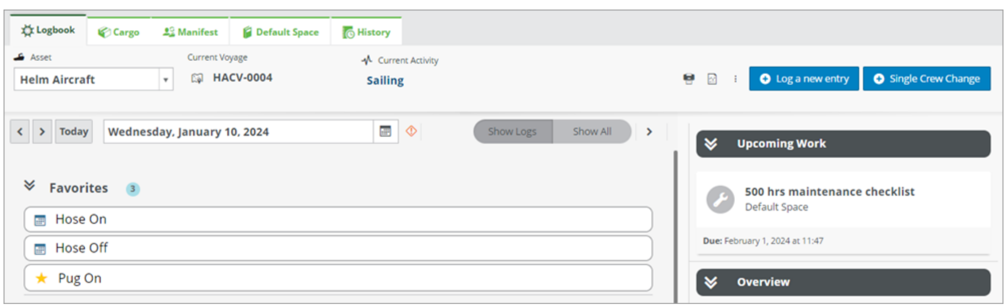
Configure Favorite Event Types in the Logbook Module

In the Logbook module, in addition to configuring specific event types as daily logs, you can now configure event types as favorites. On the Setup > Events > Event Types tab, we renamed the Daily Logs field to Favorites and made the following changes to the drop-down list:

- **Daily**: A new option called Daily now indicates if an event type is a daily log. Any event types previously configured as daily logs will automatically be configured with this option after the upgrade to Version 1.28.
- **No**: The No option now indicates if an event type is neither a daily log nor a favorite.
- **Yes**: The Yes option now indicates if an event type is a favorite.



On the Onboard > Logs > Logbook tab, we renamed the Daily Logs section to Favorites and now display daily logs at the top followed by favorites.



Additional Improvements to the Logbook Module

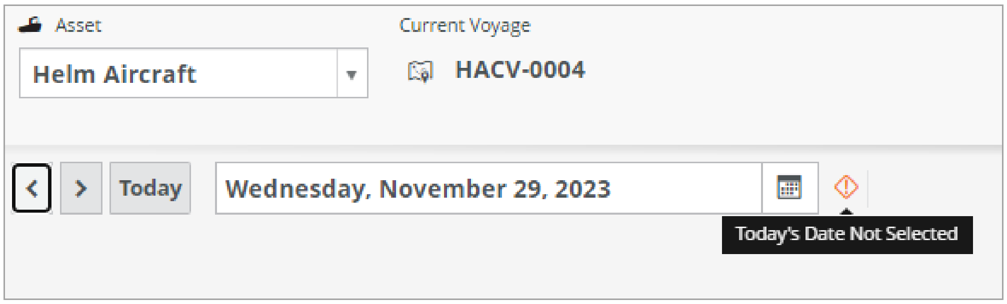
We also made the following improvements to the Logbook module in this release.

Previous Date Settings are Remembered

The date selector no longer reverts back to today's date each time you open Logbook or even if you just click away to a different screen and then back again. Instead, it will remember and display the date you previously selected.

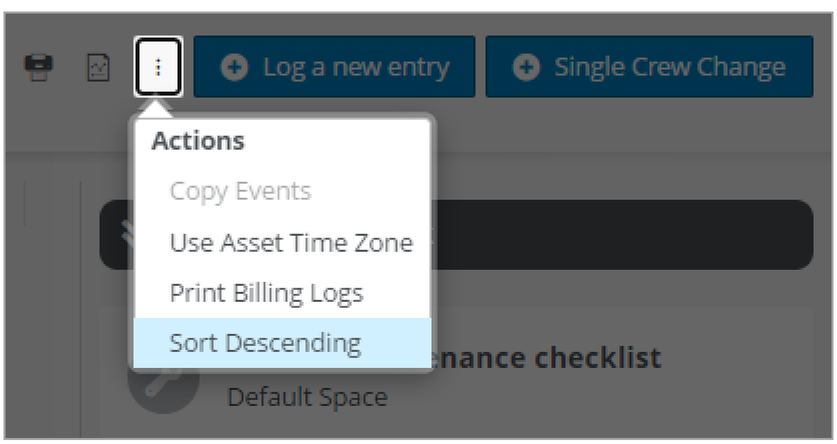
See a Warning When Today's Date is not Selected

We added a new warning icon and tooltip to the right of the daily log so you can easily see when you're not looking at today's date. This new warning makes it easier for crew to know they're submitting entries on the correct date.



Enhanced Sorting Options

Previously, you could only sort entries in ascending order so new ones were always added to the bottom of the list. You now have the option to sort entries in descending order so new entries will be added to the top of the list instead. Whichever sort order you choose will be remembered the next time you log in. We added the new sort option to the Actions menu and designed it as a toggle so, if you're currently sorting in ascending order, the sort option will say Sort Descending and vice versa.



Extended Visibility in the "Upcoming Jobs" Widget

Our "Upcoming Jobs" widget no longer shows just the activities scheduled for the next 24 hours. Instead, the widget now displays ongoing job activities until they've either been completed or canceled. This change provides a more complete display of upcoming and ongoing job activities and gives your crew a detailed overview of their scheduled jobs.

See All Current Crew Without Leaving the Logbook

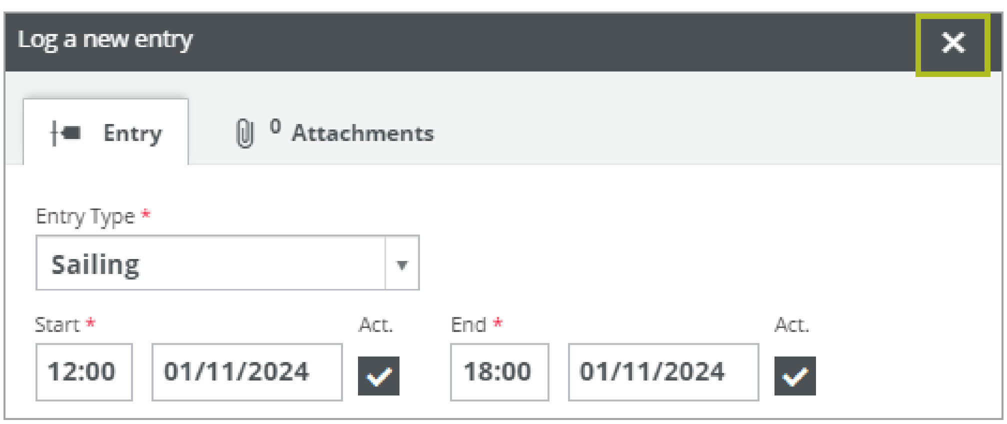
Now when you click Show All at the bottom of the Current Crew widget, the widget will expand to show you a complete list of all your current crew.

Add Attachments to Events and Activities

We added a new Attachments tab to the "Log a new entry" and "Update Event" windows that allows you to add attachments to new and existing events and activities.

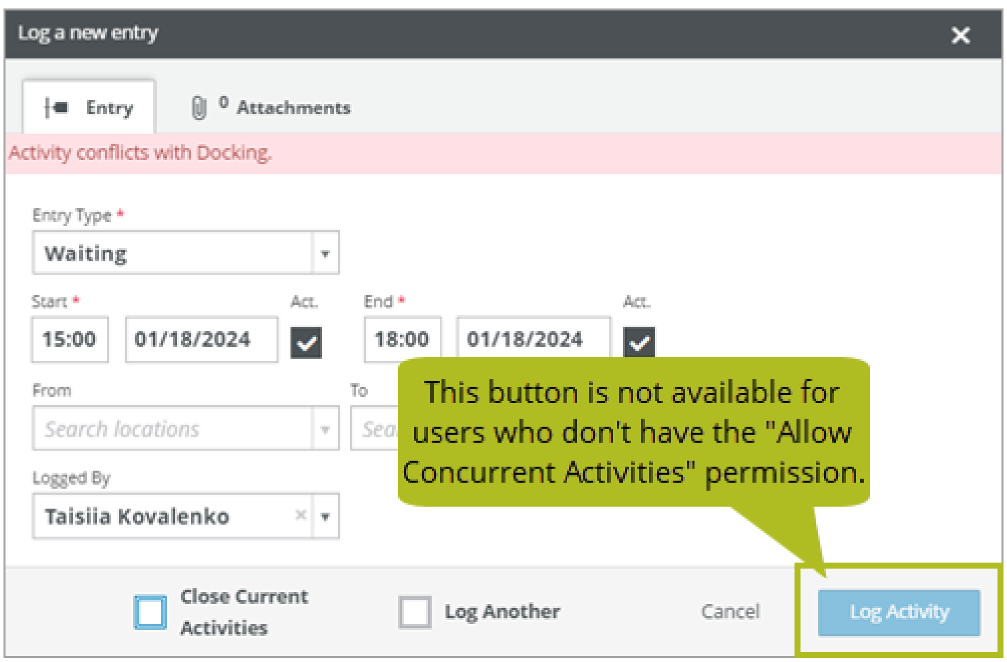
No Longer Close Your Log Entries by Accident

The logbook entry will no longer close if you click outside of it. We added an X icon to the top right corner of the "Log a new entry" window so you'll only close an entry when you're ready.



Manage Who Can Log Concurrent Activities in the Logbook Module

Previously, all Logbook users could log multiple activities in the same time period. In this release, we added a new permission under Extras called “Allow Concurrent Activities” so you can manage which users can do this. Anyone whose role currently includes the Onboard > Logbook permission will automatically receive this new permission after the upgrade to Version 1.28, which means they will be able to log concurrent activities in the same manner they did in Version 1.27. If you want to prevent someone from logging concurrent activities, you must manually remove the new permission from their role. If you do not include the “Allow Concurrent Activities” permission in someone’s role, the “Log Activity” button in the “Log a new entry” window will be disabled if they try to log an activity in the same time period as an open activity.

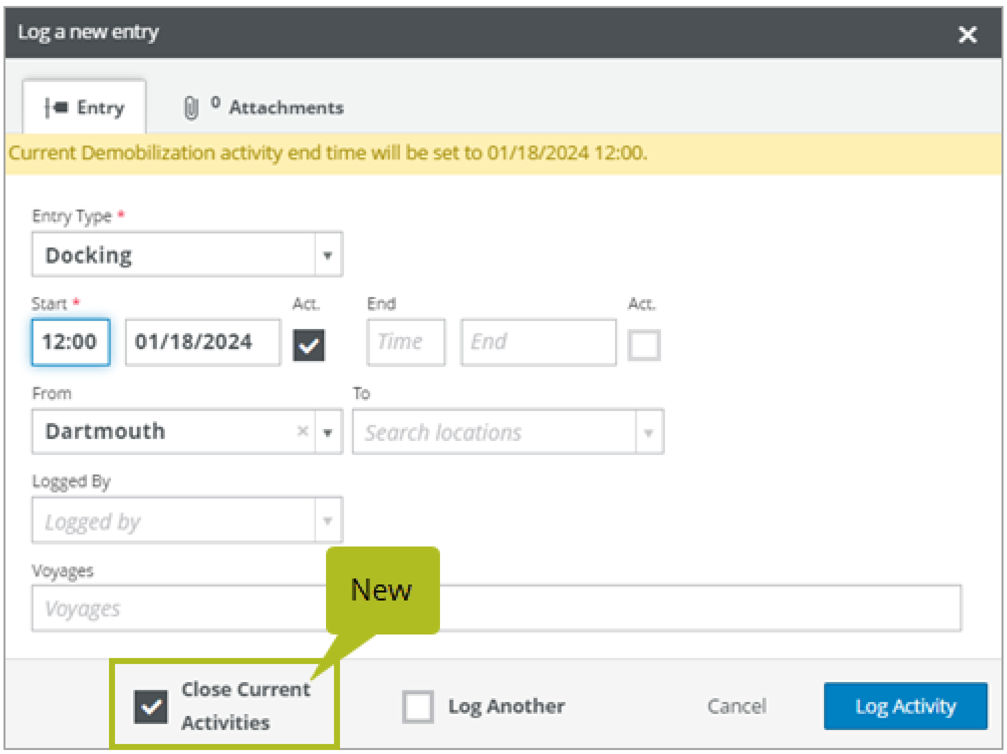


NOTE

The “Allow Concurrent Activities” permission only affects activities logged on the Onboard > Logs > Logbook tab. It does not affect activities logged in the default work space in Onboard > Logs.

Close Current Activities While Logging a New One in the Logbook Module

In the “Log a new entry” window, we added a new check box called “Close Current Activities” that allows you to quickly close any open activities when you log a new activity. If you select the new check box, the start date and time and the from location of the new activity you’re logging will be automatically entered as the end date and time and the to location of any open activities.



Additional Permission Changes for the Logbook Module

We also made the following permission changes for the Logbook module in this release.

New Onboard > Logbook > Logbook Permission

To make room for new permissions coming soon for the Logbook module, we added another level to the Onboard > Logbook permission group. Anyone who whose role currently includes the Onboard > Logbook permission will have that permission automatically migrated to the new Onboard > Logbook > Logbook permission after the upgrade to Version 1.28.

Allow Activities to Have Empty Planned End Date

We added a new permission under Extras called "Allow Activities To Have Empty Planned End Date" that allows you to save an activity entry without being required to provide a planned end date. This permission will not be turned on in your tenant after the upgrade to Version 1.28. Please reach out to your account manager if you're interested in using this feature.

Allow Updates to Log Entries

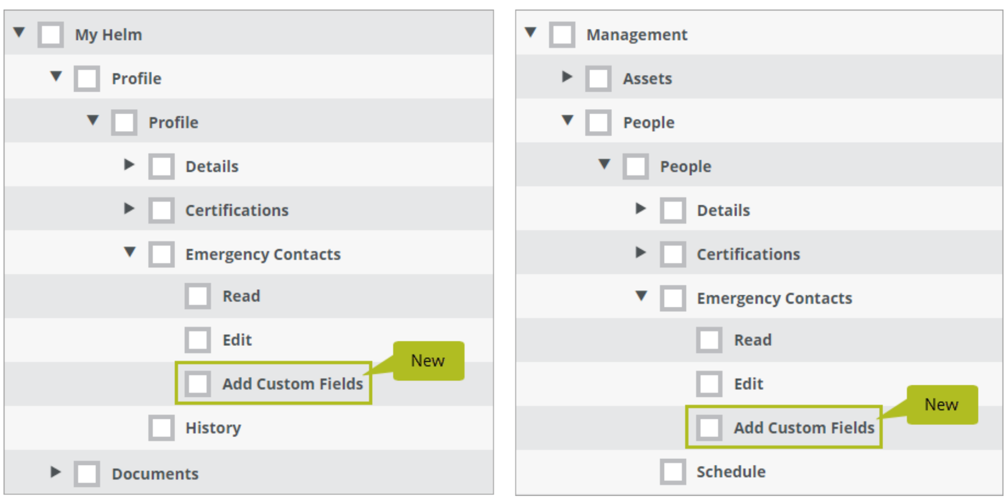
We added a new permission under Extras called "Allow Updates To Log Entries" that controls who can edit the fields on logbook entries once the actual times have been saved. It also controls who can remove attachments from those entries, although users without this permission can still add new attachments. Anyone whose role currently includes the Onboard > Logbook permission will receive this permission automatically after the upgrade to Version 1.28.

Helm CONNECT Personnel

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

Manage Who Can Add Custom Fields for Emergency Contacts

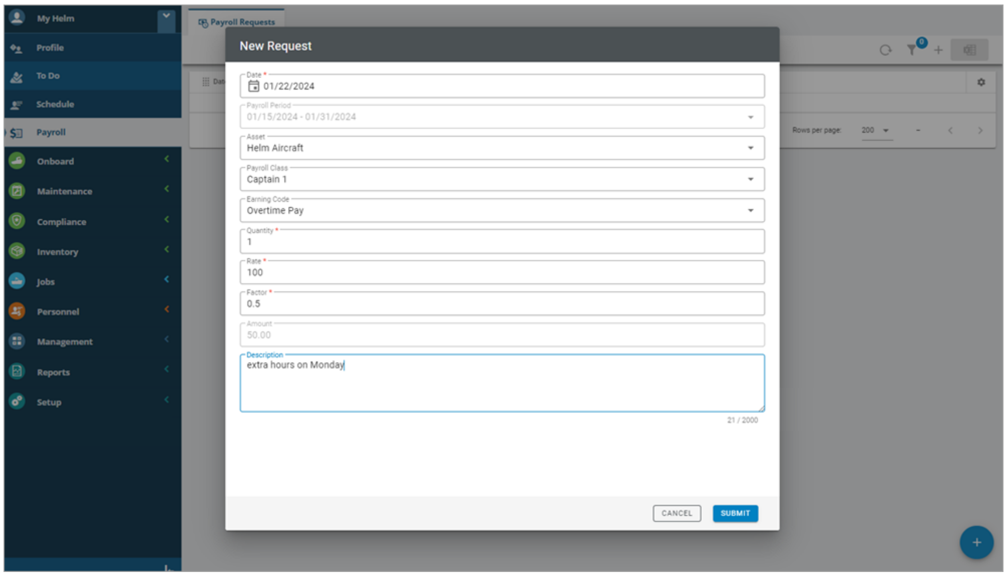
On the Setup > Users > Roles tab, we added two new Add Custom Fields permissions under My Helm > Profile > Profile > Emergency Contacts and Management > People > People > Emergency Contacts to manage which users can add new custom fields to those Emergency Contacts tabs. Previously, anyone with Edit permissions for those tabs could add new custom fields that would impact all other users. The new permissions allow you to limit this behavior to specific admin users.



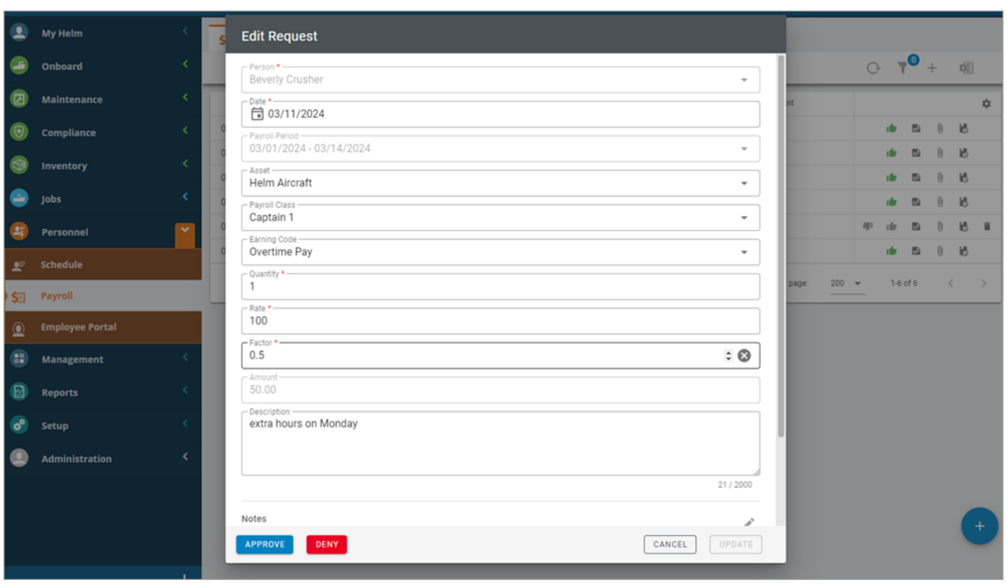
Anyone whose role currently includes Read or Edit permissions for either of those tabs will automatically receive the Add Custom Fields permission for that tab after the upgrade to Version 1.28. If you don't want someone to have these permissions, you must manually remove them from their role.

Crew Can Request Pay and Submit Expenses in My Helm

We added a new Payroll Requests tab under My Helm > Payroll so your crew can manage their own payroll requests and expenses. They can also include notes and attachments and view a change log.



We also added a new Payroll Requests tab under Personnel > Payroll where your payroll team can review any payroll requests or expenses submitted by your crew.



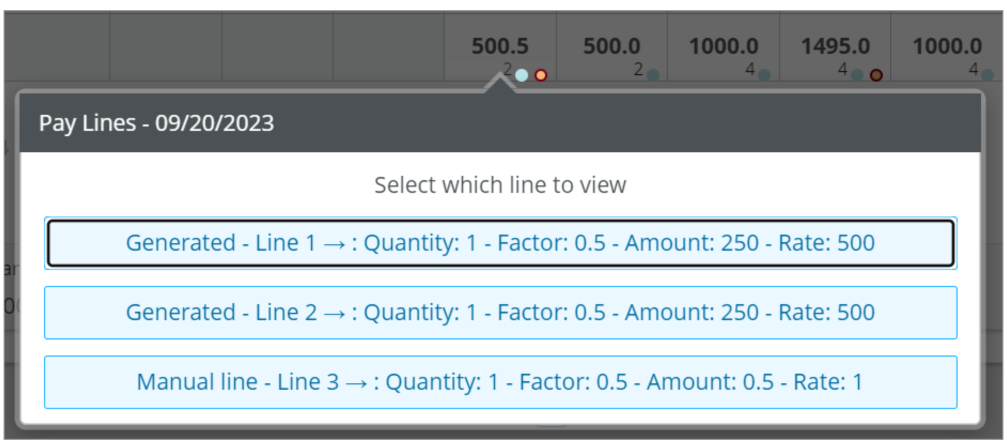
Once the payroll team has reviewed the request, the crew member will see in My Helm whether it was approved or denied.

NOTE
The new My Helm > Payroll > Payroll Requests tab is not yet available on asset installations.

Improvements to the Adjust Payment Workflow

After introducing the new Payroll Requests tab under My Helm > Payroll (see “Crew Can Request Pay and Submit Expenses in My Helm”), we also made several improvements to the Pay Lines window where you manage adjusted or manual payments.

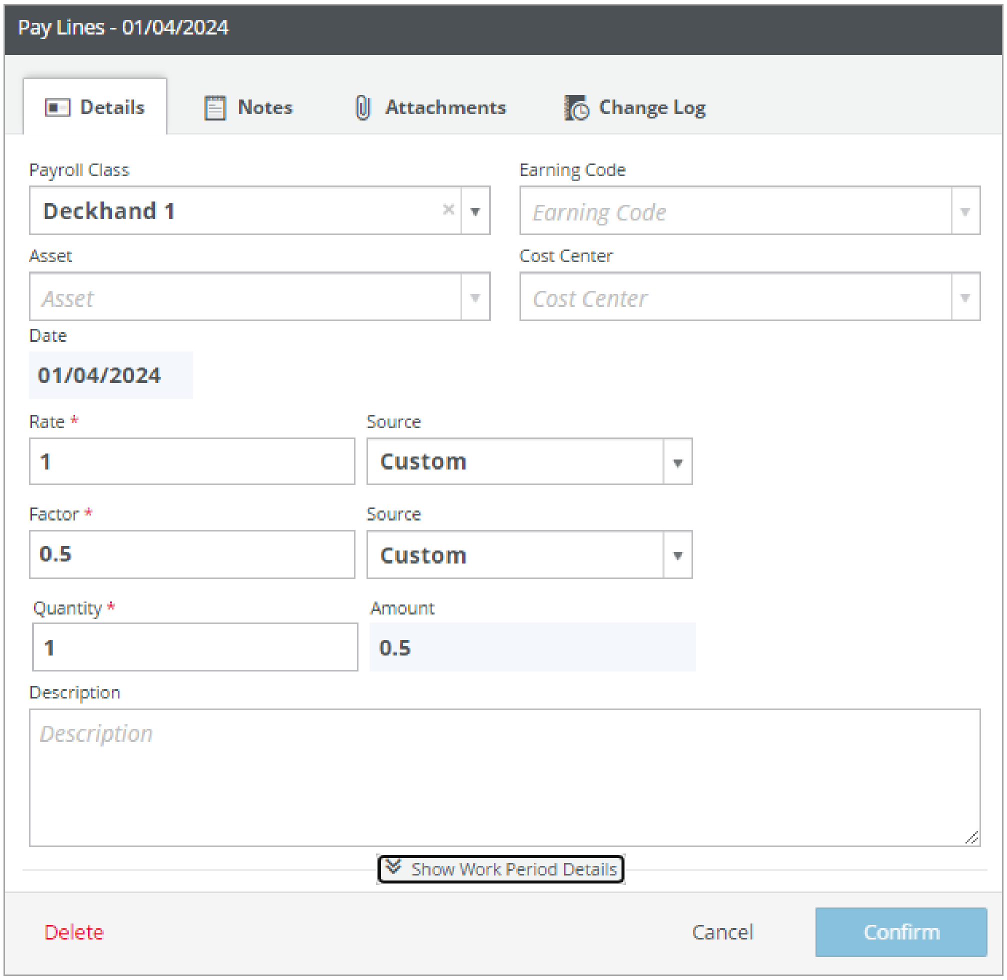
We now display each pay line in its own window instead of displaying them as separate tabs in a single window. Simply click the related work period to see a list of the available pay lines.



We also made the following changes to the Pay Lines window:

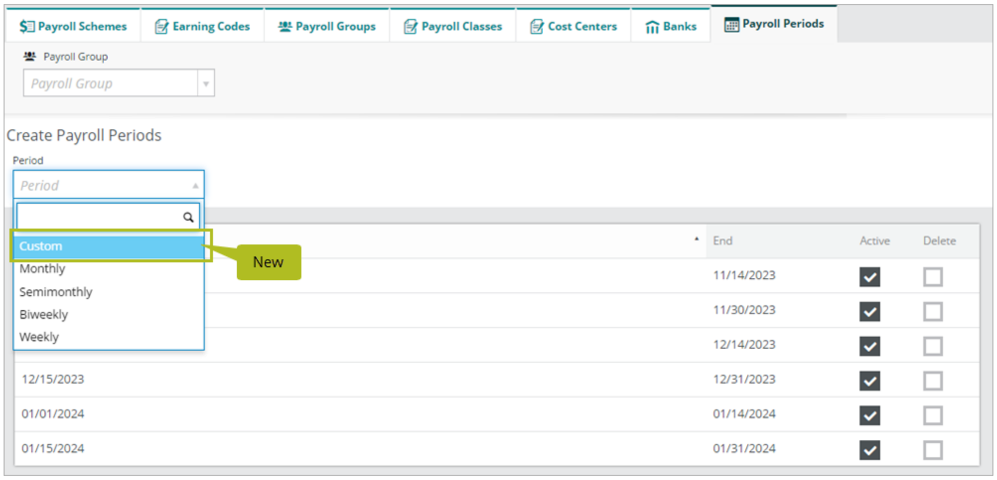
- Since we now display only one pay line per window, we renamed the first tab to Details.
- We added Notes and Attachments tabs so you can add notes and attachments related to the pay line.

- We added a Change Log tab so you can review the changes that have been made to the pay line.



Create Custom Payroll Periods

If your company's payroll periods don't match one of our default periods (Monthly, Semimonthly, Biweekly, or Weekly) you now have the option to create custom payroll periods.



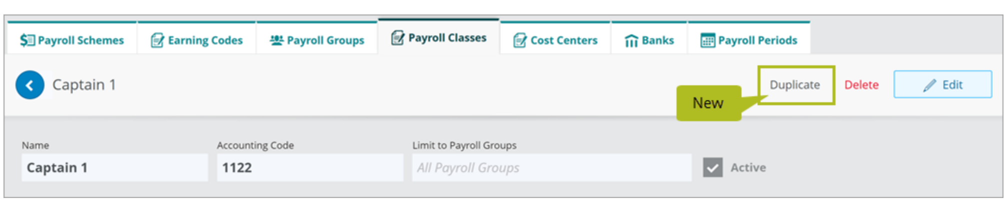
Create Monthly Payroll Rules

We added three new options for Date targets in the Rate, Extra Pay, Bank Accruals, and Bank Withdrawals sections of your payroll schemes so you can create a variety of monthly payroll rules:

- **Day of Month**: Create a rule to pay on a specific day or days of every month.
- **Last Day of Month**: Create a rule to pay on the last day of every month.
- **Month of Year**: Create a rule to pay in a selected month.

Quickly Duplicate a Payroll Class

Setting up new payroll classes just became so much easier. We added a new Duplicate button to the Setup > Payroll > Payroll Classes tab that allows you to simply duplicate an existing payroll class and then quickly change any necessary details.



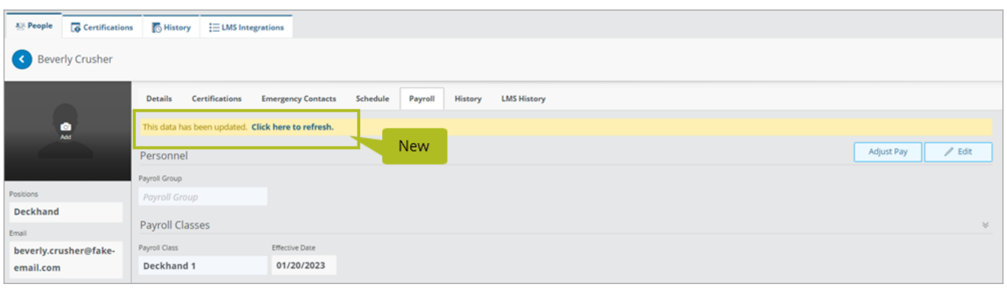
Improvements to the "Asset: Name" Field in Payroll Schemes

On the Setup > Payroll > Payroll Schemes tab, we made the following improvements to the Asset: Name field for all rule types:

- We removed it as an option for Date-based conditions; it’s still an option for Work Period and Crew Change conditions.
- We changed it from a text-entry to a multi-select field.

Immediately See When Someone Else Makes a Bank Adjustment

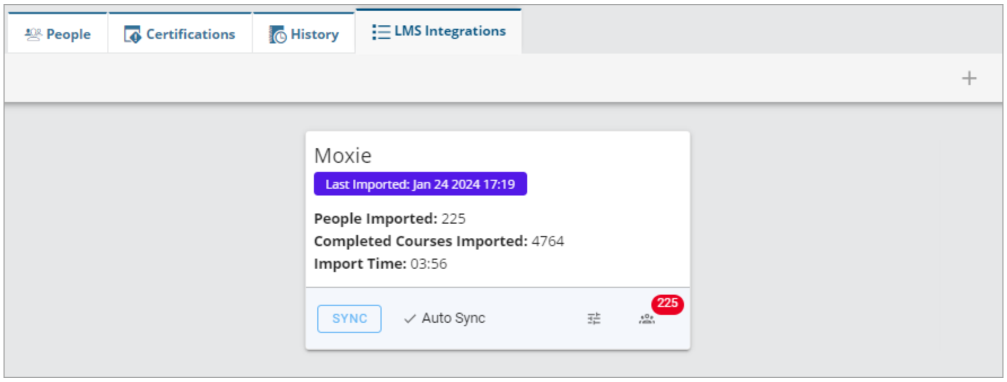
If you’re viewing the Payroll sub-tab from My Helm > Profile > Profile or Management > People > People, and someone makes a bank adjustment from another tab, you’ll immediately see a yellow notification banner with a message that the data has been updated and a link to refresh the page.



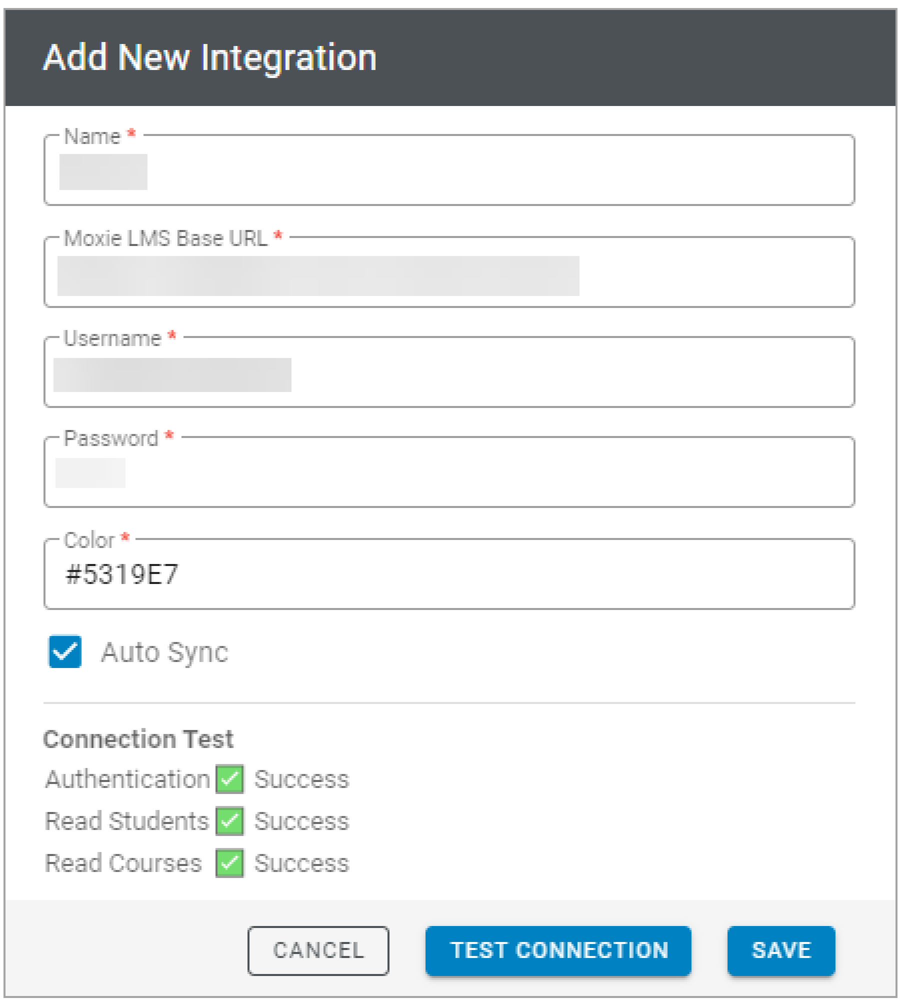
Improvements to the Moxie Media LMS Integration

Our integration between Helm CONNECT and Moxie Media’s Learning Management System (LMS) helps you save time and demonstrate compliance by importing your crew training records directly into Helm CONNECT. Based on valuable feedback and suggestions from our customers, we made several improvements to the integration in this release.

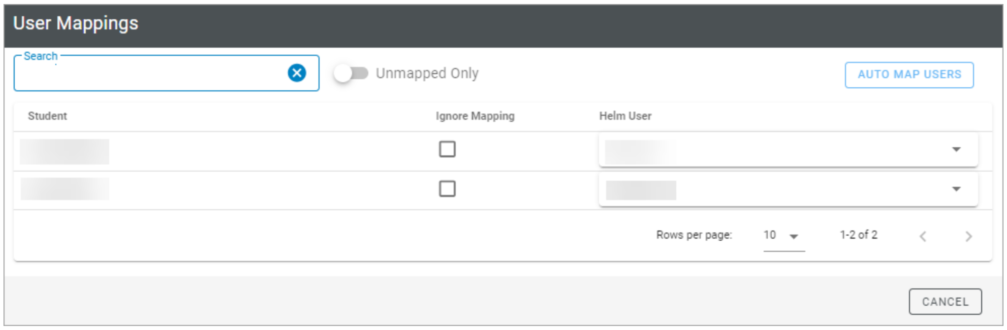
To start, we improved the layout of the Management > People > LMS Integrations tab by making it more compact.



We also moved the TEST CONNECTION button into the Add New Integration window. As soon as you click the button, the testing information will appear right in the window.



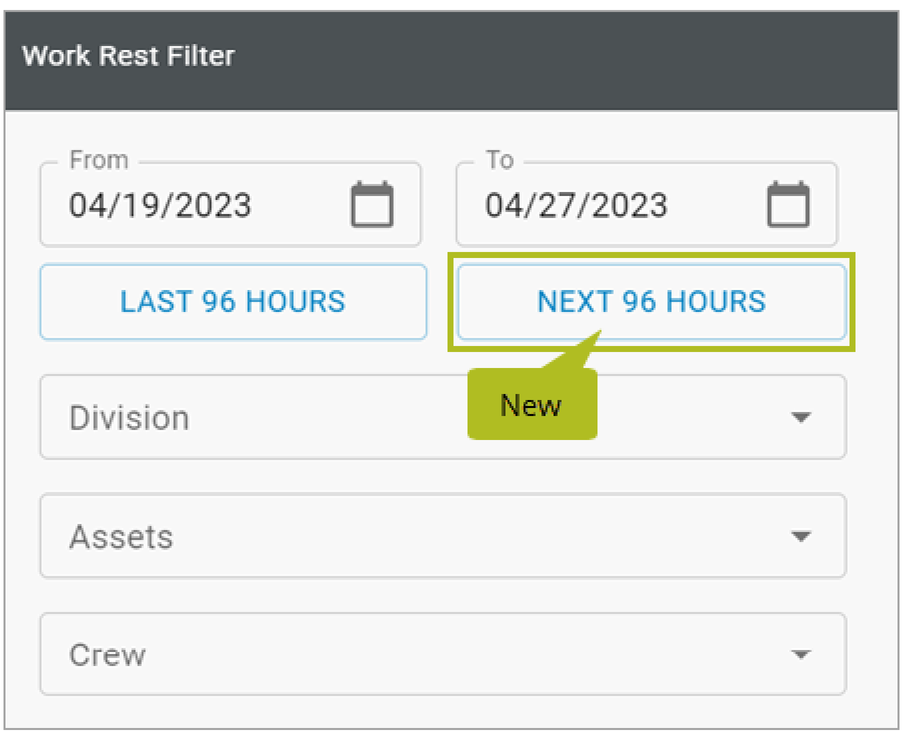
And finally, in the User Mappings window, we moved the AUTO MAP USERS button to the upper right corner and added an Unmapped Only toggle so you can quickly filter the list to find any unmapped students.



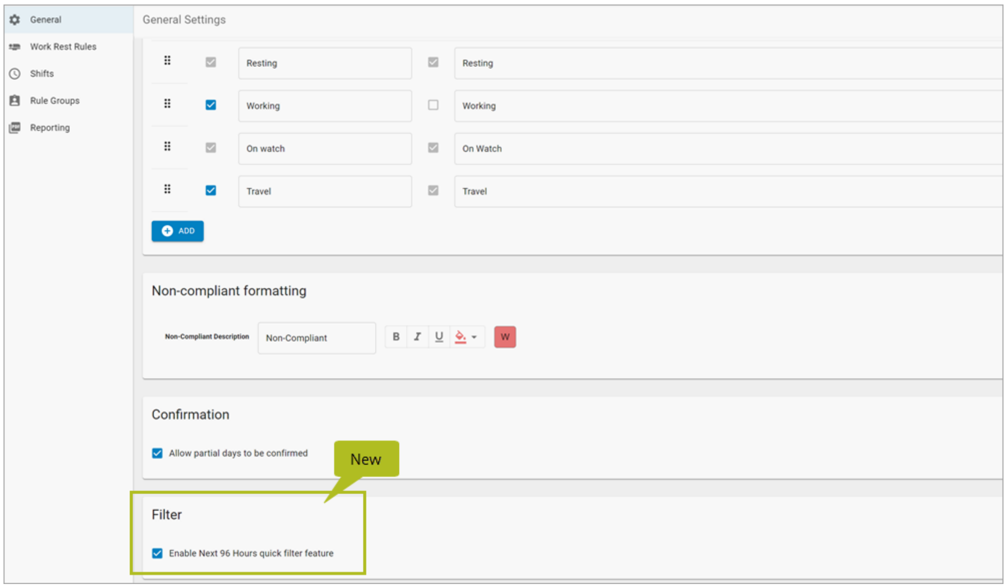
Improvements to the Work Rest Module

Quickly See Data for the Next 96 Hours

We added a new NEXT 96 HOURS button to the Work Rest Filter so you can look ahead to your work-rest data for the next 96 hours.



The new Next 96 Hours filter button will be off by default when you upgrade to Version 1.28, but you can turn it on by selecting the new “Enable Next 96 Hours filter feature” check box under Settings > General.



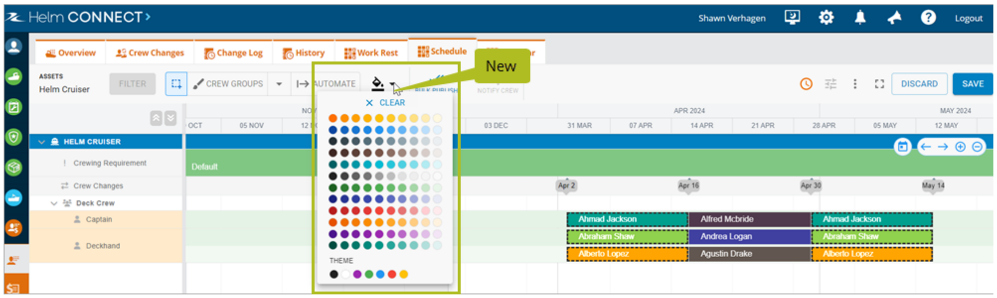
Onboard Filters Are Remembered After You Reload the Page

We addressed an issue on the Onboard > Personnel > Work Rest tab where your filters weren’t remembered if you reloaded the page.

Improvements to the New Crew Scheduling Module

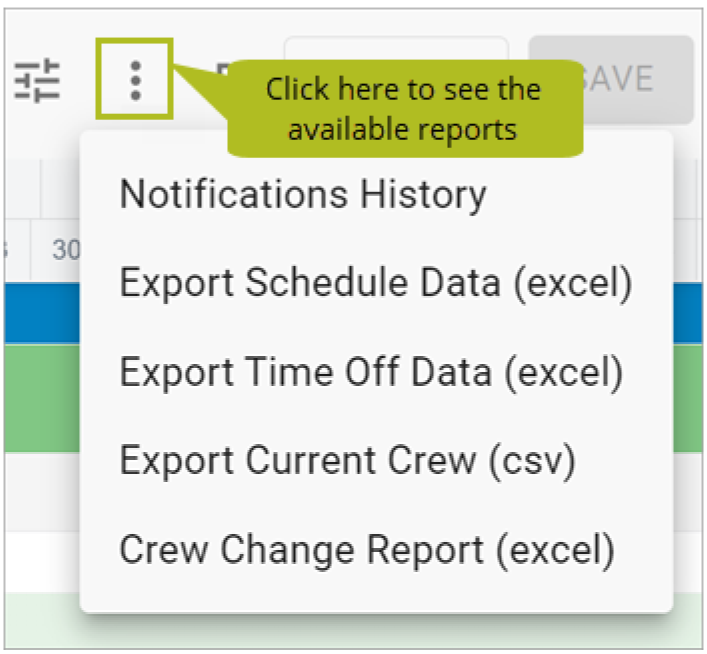
Customize Your Schedule Colors

You now have the option to customize the colors on your schedule to suit your own preferences and workflows. You can either select one time bar at a time or use the box selector tool and select several time bars, then click the new Paint Bucket icon to apply a color to your selection. Click Save to apply your changes.



New Export Data Menu

We added a new Export Data icon to the toolbar on the Personnel > Schedule > Schedule tab. Click the new icon to see all the available CSV and Microsoft Excel reports.



Enhancements to the Schedule Data Report

The Schedule Data report now includes a calculated view of the schedule that counts each crew member's number of days onboard.

New Reports

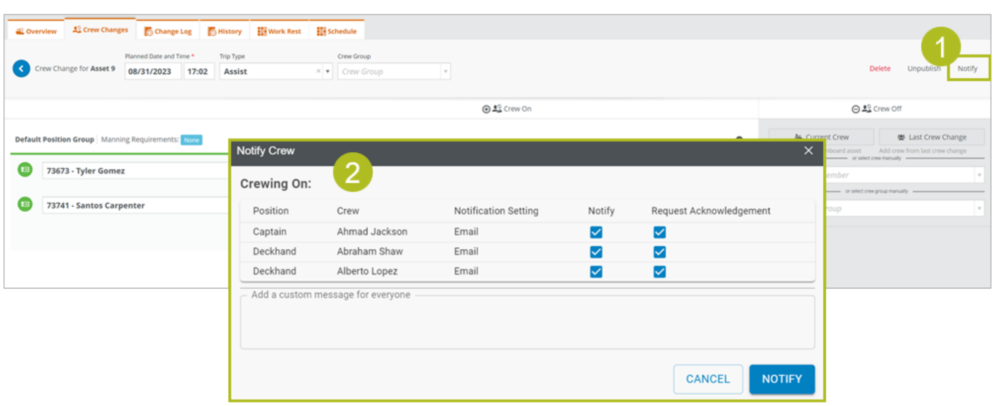
Based on valuable feedback from our customers, we added three new reports in this release:

- **Time Off**: This report allows you to export all the time off data for a selected date range to Microsoft Excel.
- **Current Crew**: This report allows you to export who is onboard at a specified time in CSV format. If you don't specify a time, the report will use the current time.
- **Crew Change**: This report allows you to export all the crew change data for a selected date range to Microsoft Excel, including who is crewing on and off and who is onboard.

Send Manual Crew Change Notifications

In this release, you can ask your account manager to disable the automatic notifications sent by the system when crew changes are published or modified, and enable manual notifications instead.

If manual notifications are enabled, you'll see a new Notify button on the Personnel > Schedule > Crew Changes tab when you're viewing a published crew change. Clicking the Notify button will open the Notify Crew window, where you can select the crew members you want to notify and whether or not you want them to acknowledge the notification. You can also include a custom message.

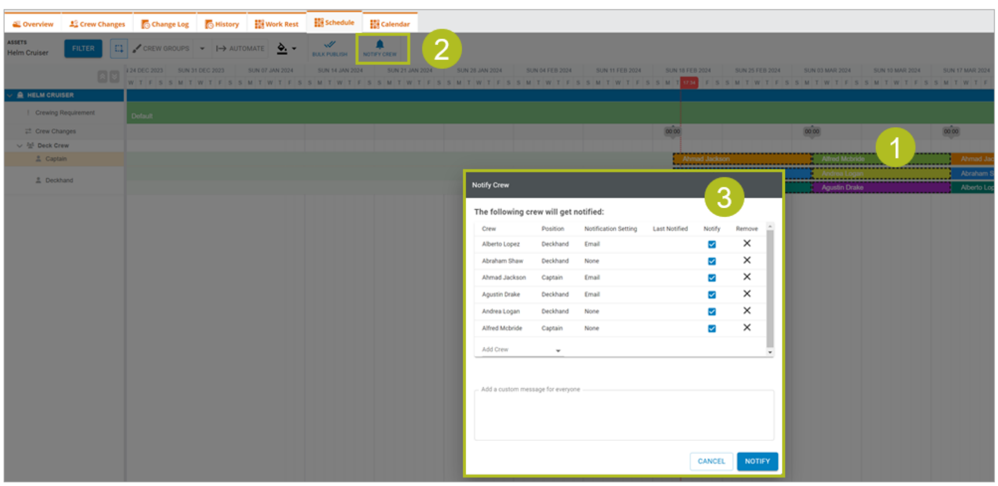


NOTE

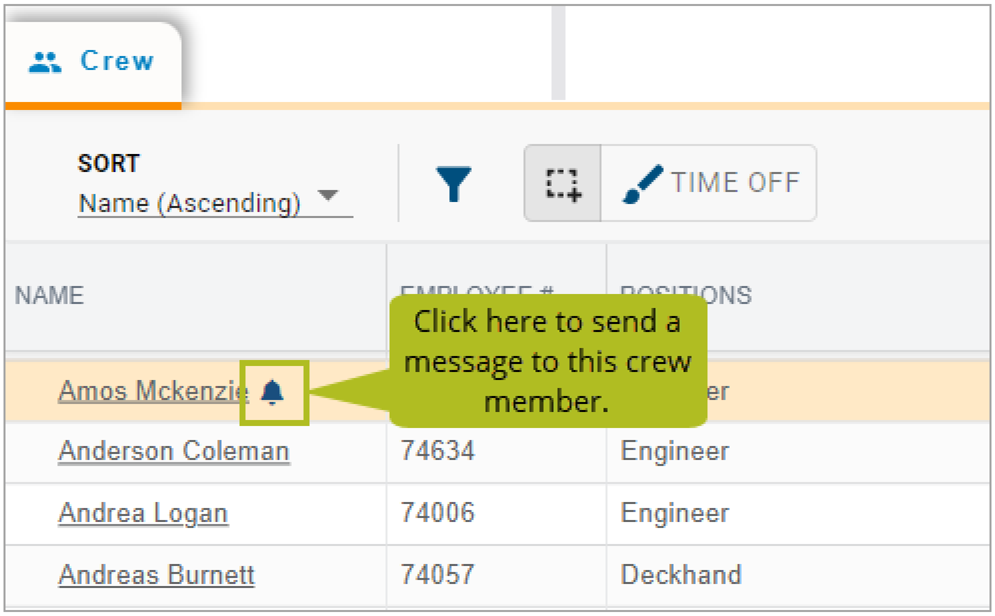
The new manual crew change notifications will not be automatically turned on in your tenant after the upgrade to Version 1.28. Please contact your account manager if you'd like to have this feature turned on.

Send Crew Messages from the Schedule

If you have the new manual notifications enabled in your tenant, you can send messages to your crew from the Personnel > Schedule > Schedule tab. You can either select one time bar at a time or use the box selector tool and select several time bars, then click NOTIFY CREW to open the Notify Crew window. From there, you can enter the message and confirm which crew members you want to notify.

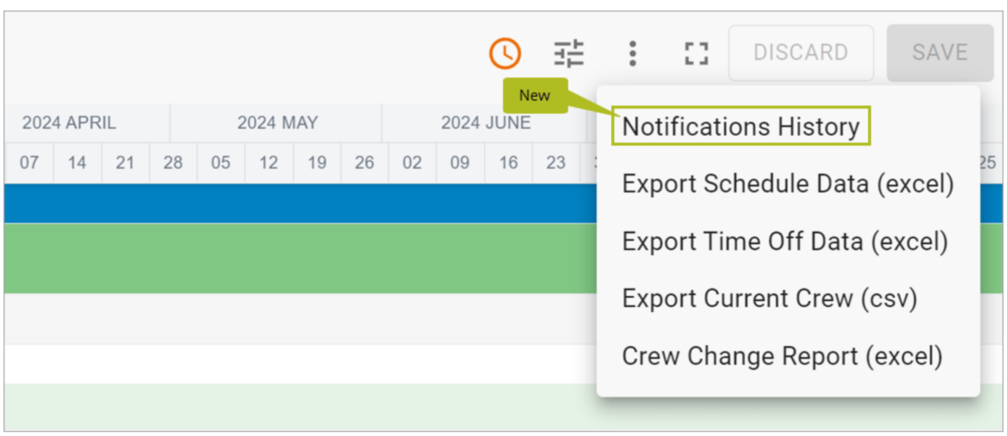


You can also send crew messages from the Personnel > Schedule > Schedule > Crew sub-tab. Find the crew member you want to notify and hover over their name, then click the Notify Person icon to open the Notify Crew window.



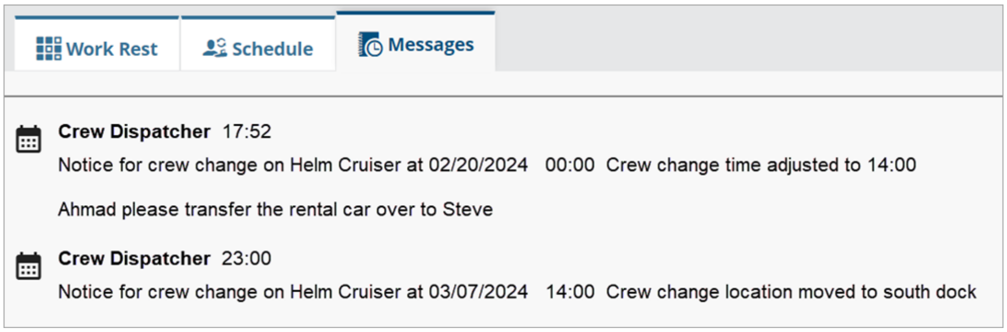
See All Notifications You've Sent to Your Crew

If you have the new manual notifications enabled in your tenant, you'll have a new option on the Export Data menu on the Personnel > Schedule >Schedule tab that allows you to see a history of the manual notifications you've sent to your crew.



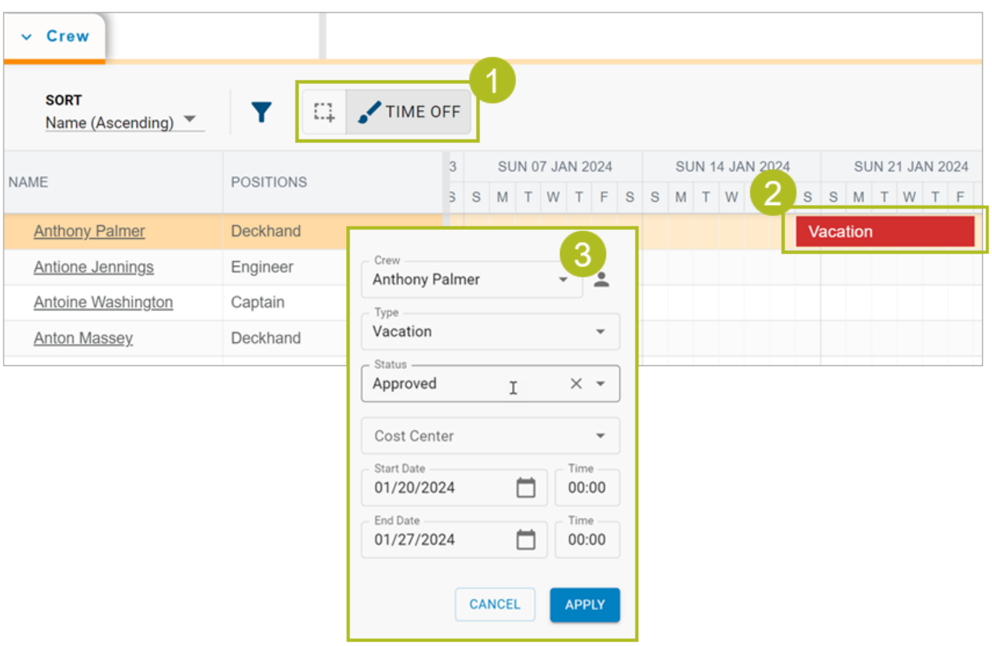
Crew Can See Notifications Received in My Helm

If you have the new manual notifications enabled in your tenant, your crew will have a new tab under My Helm > Schedule called Messages that allows them to see a list of all the manual notifications they've received.



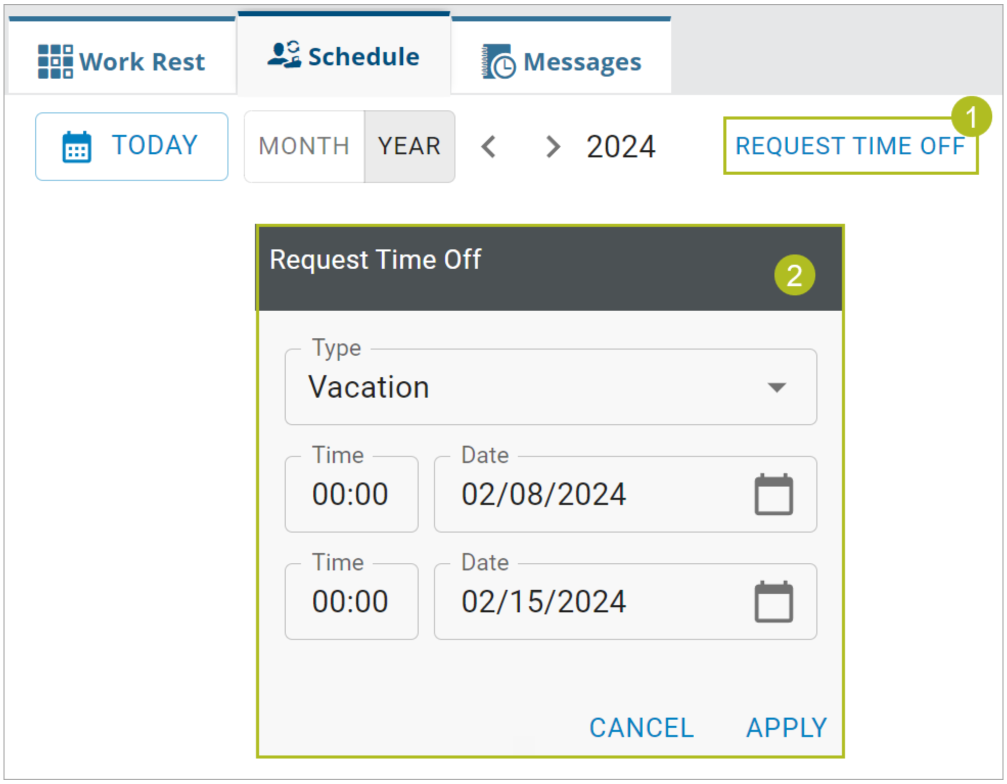
Manage Crew Time Off from the Schedule

You can now manage crew time off right from the schedule, instead of having to go each crew member's profile under Management > People > People. On the Personnel > Schedule > Schedule > Crew sub-tab, simply click the new TIME OFF tool and "paint" the crew member's requested time off right onto the schedule. Double-click the request to open a window where you can modify any necessary details.

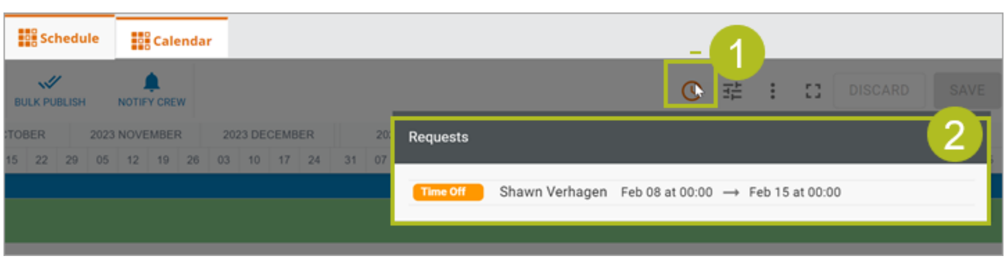


Crew Can Request Time Off in My Helm

Your crew can now request time off from the My Helm > Schedule > Schedule tab by clicking REQUEST TIME OFF.

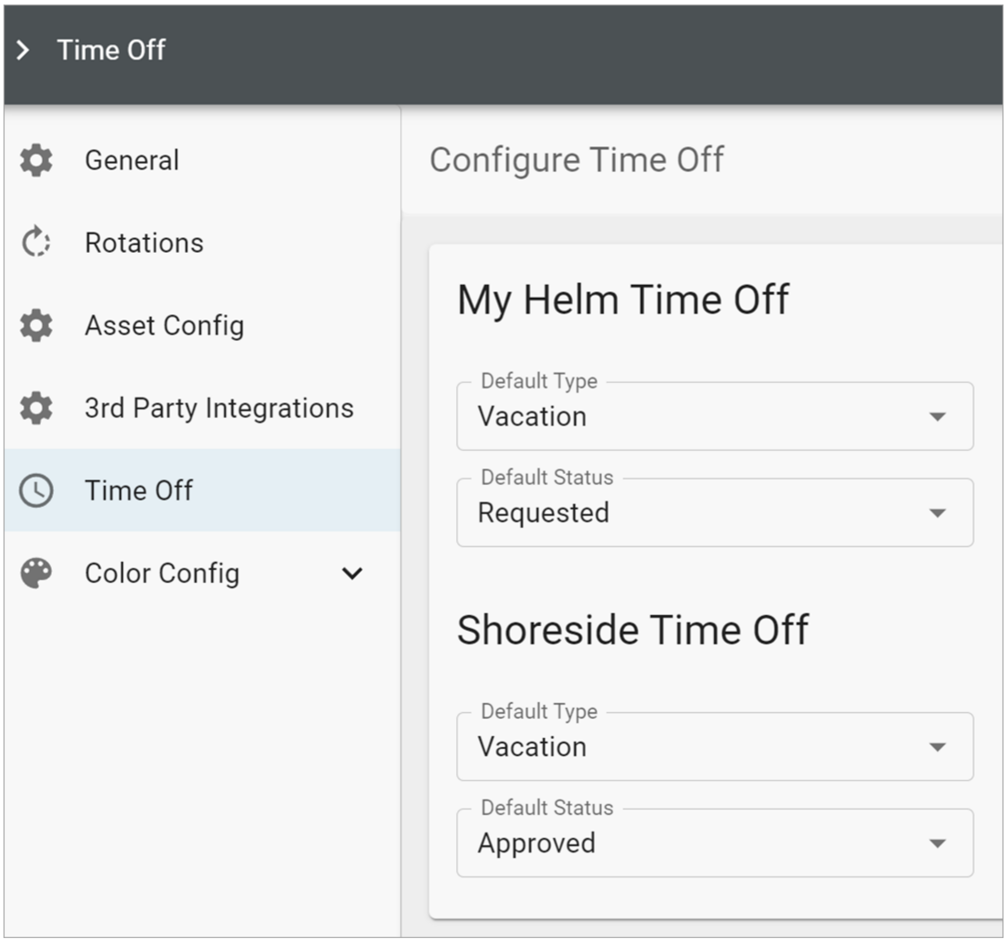


You'll see a Requests icon on the Personnel > Schedule > Schedule tab if you have any time off requests from your crew waiting for review. Click the Requests icon to review the list of pending requests.



Configure Time Off Defaults

When you click the Settings icon from the Personnel > Schedule > Schedule tab, you'll see a new Time Off option to configure your time off defaults on the Schedule tab and for your crew in My Helm.

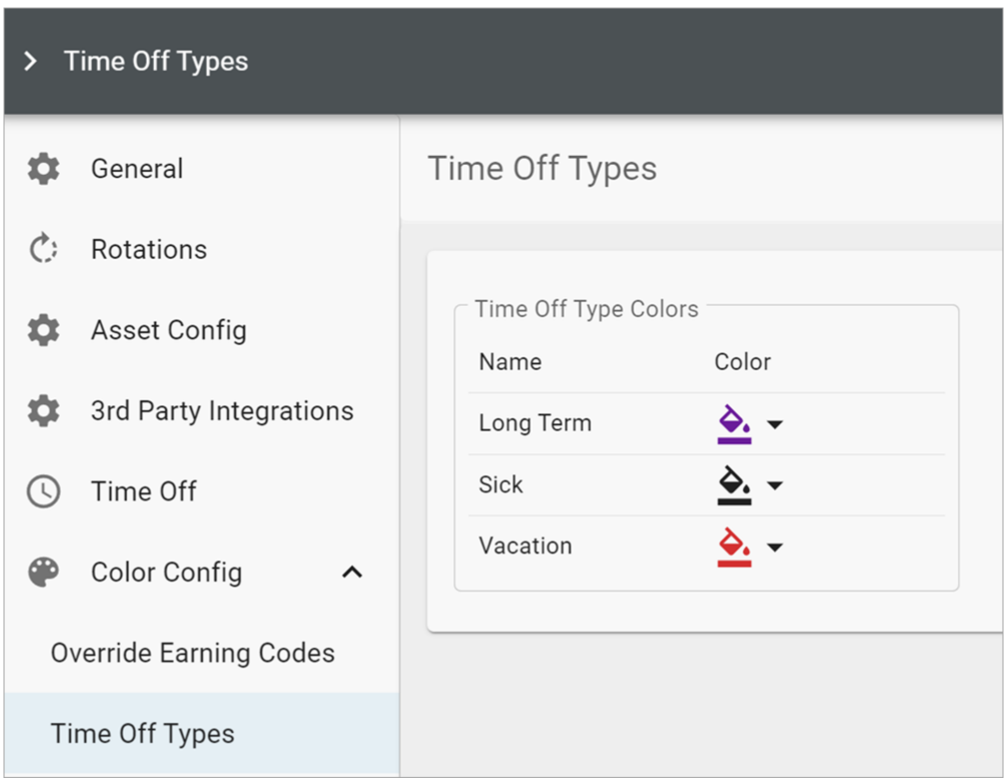


- **My Helm Time Off**:
  - Default Type: This is the default value for the Type field in the Request Time Off window in My Helm; a crew member can select a different value when requesting time off.
  - Default Status: This is the default status after a crew member has submitted a time off request in My Helm. Crew members don't see this value; it's used to trigger a notification on the Schedule tab that time off has been requested by a crew member.

- **Shoreside Time Off**:
    - Default Type: This is the default type when you add time off to the schedule.
    - Default Status: This is the default status when you add time off to the schedule.

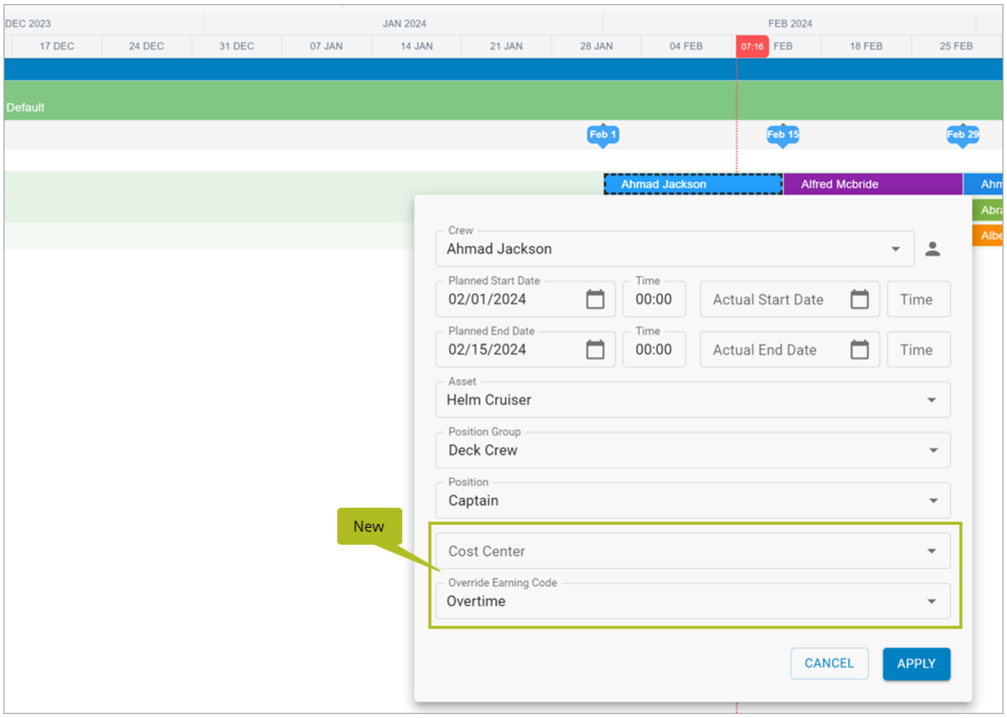
Configure Colors for Time Off Types

When you click the Settings icon from the Personnel > Schedule > Schedule tab, you'll see a new Color Config > Time Off option to configure the colors for your time off types on the schedule.

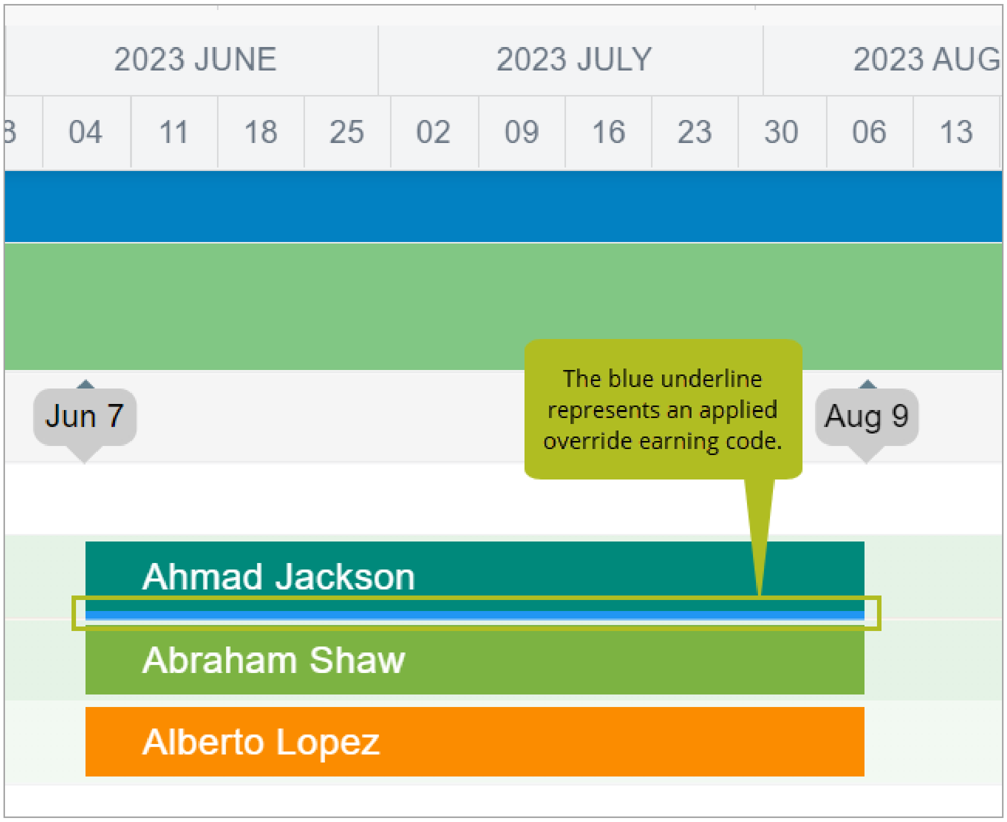


Manage Cost Centers and Override Earning Codes Right from the Schedule

When you double-click a time bar on the Personnel > Schedule > Schedule tab, you'll see two new fields—Cost Center and Override Earning Code—allowing you to manage cost centers and override earning codes right from the schedule.

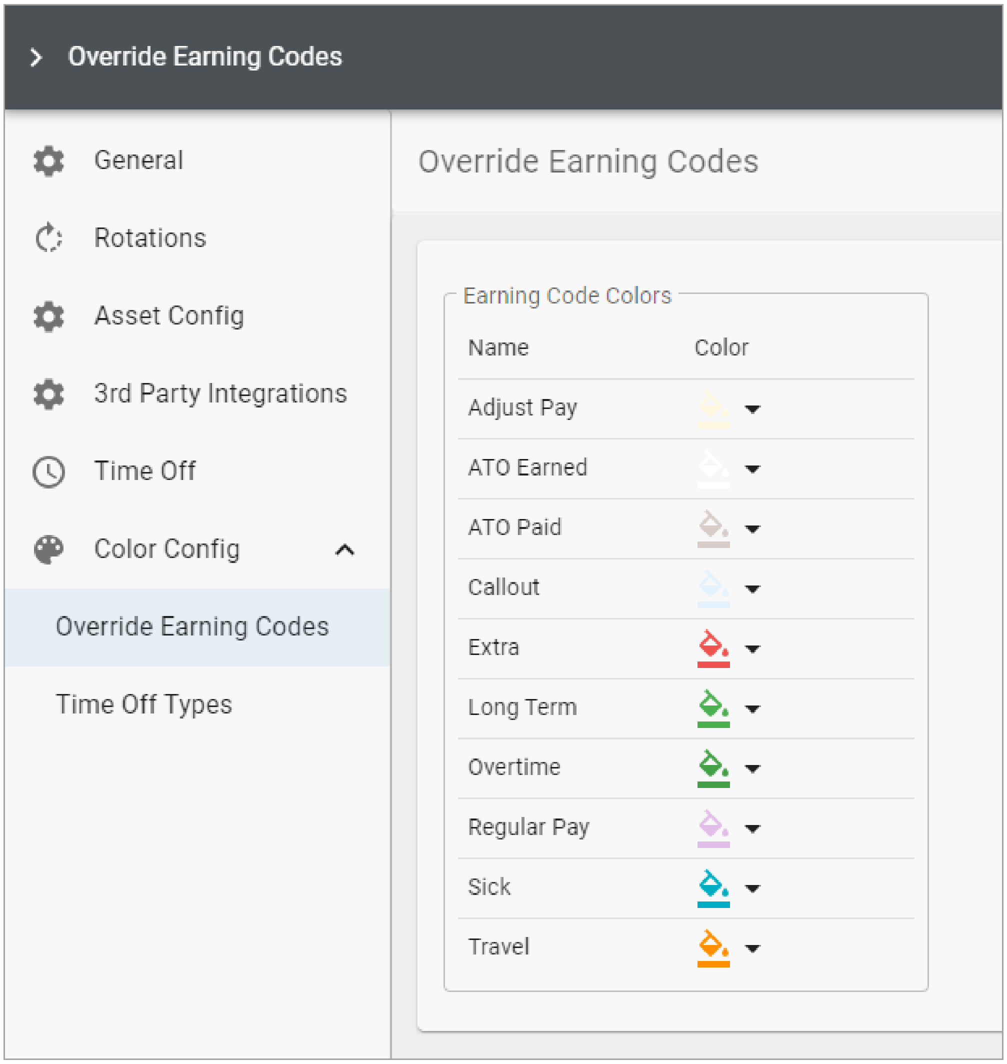


When an override earning code has been applied, the color representing that code will be displayed as an underline below the time bar on the schedule.



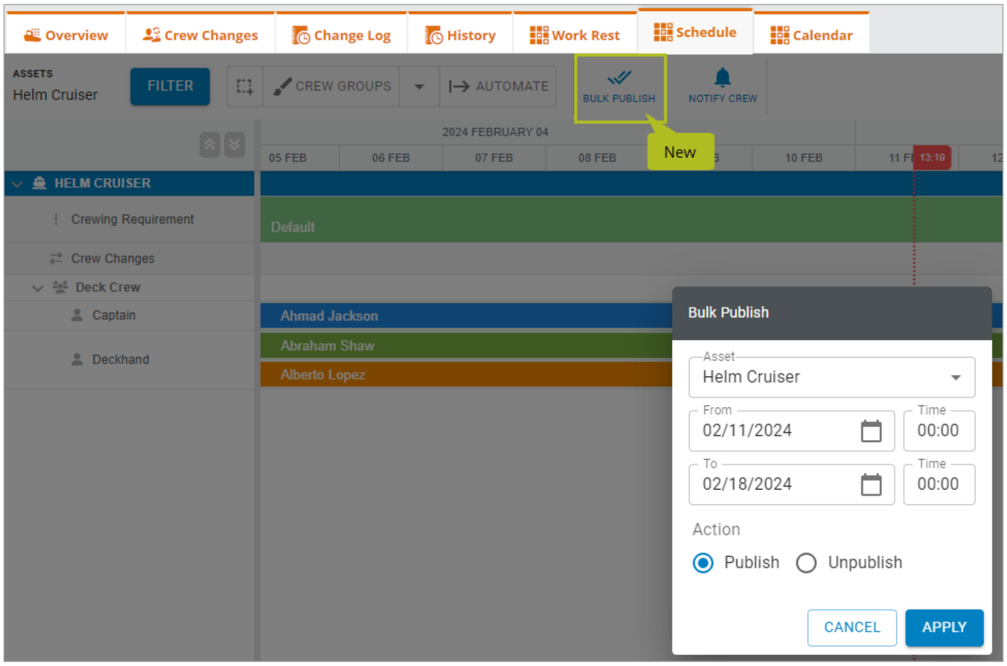
Configure Colors for Override Earning Codes

When you click the Settings icon from the Personnel > Schedule > Schedule tab, you'll see a new Color Config > Override Earning Codes option that allows you to configure the colors for your override earning codes on the schedule.

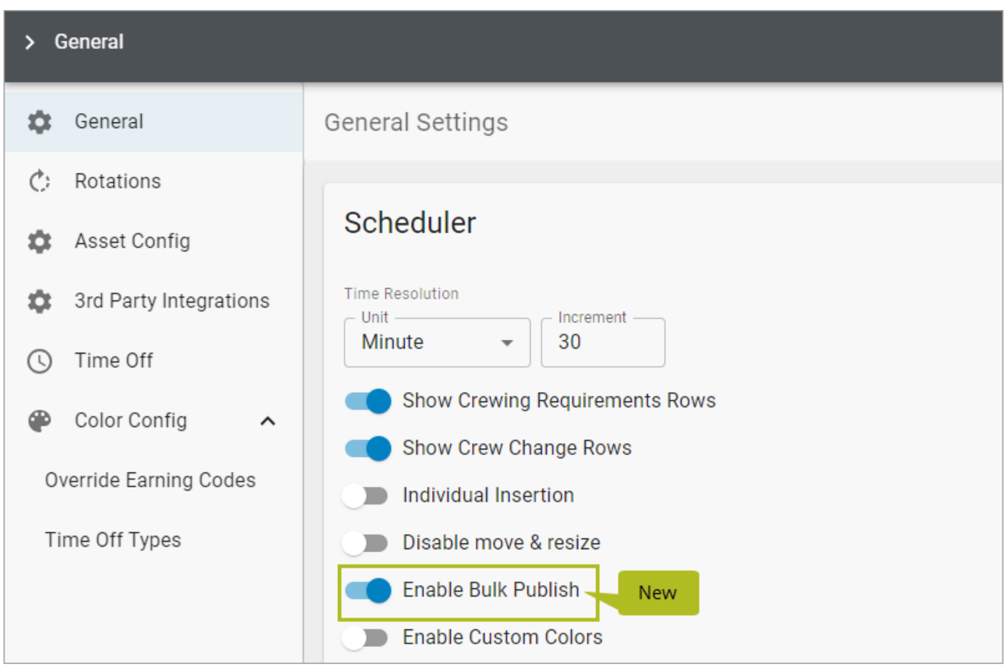


Bulk Publish Your Crew Changes

A new Bulk Publish button allows you to publish or unpublish all the crew changes for an asset within a selected date range. This feature will be handy for those of you who do daily crew changes.

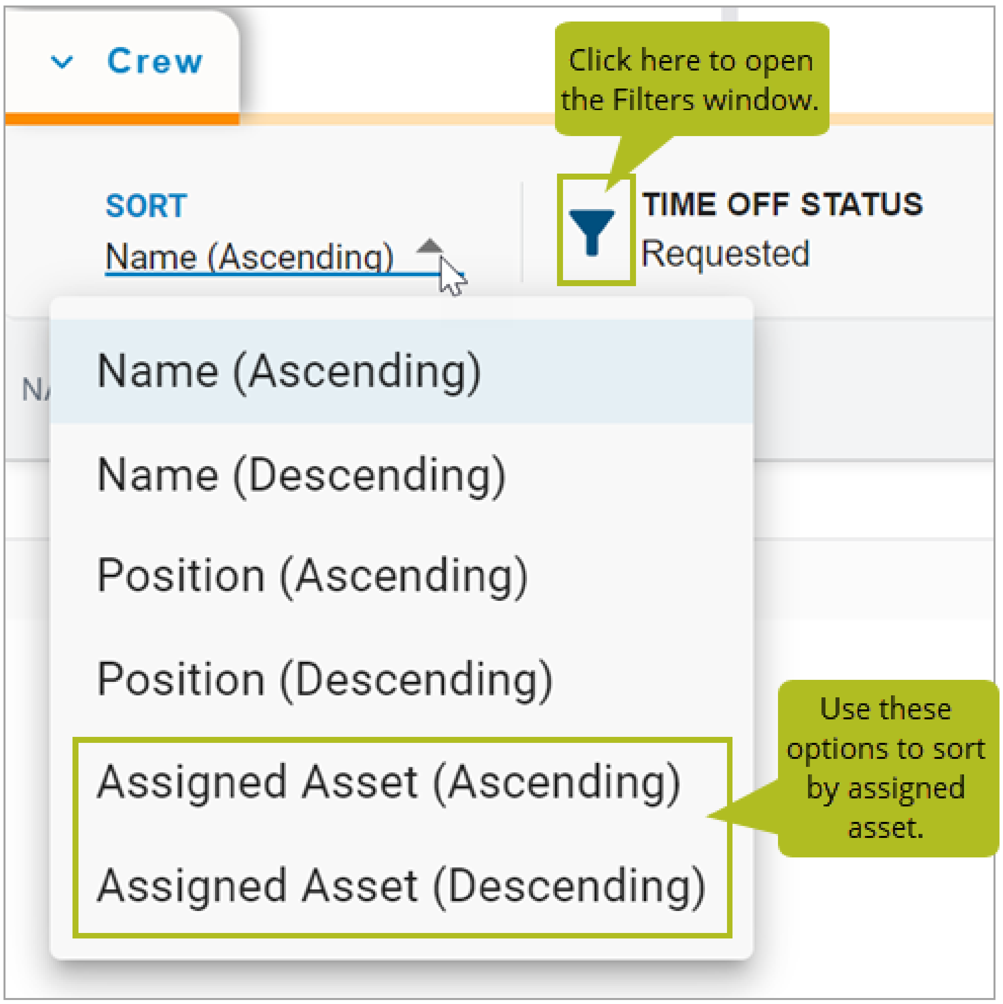


The Bulk Publish button will be turned off by default when you upgrade to Version 1.28, but you can turn it on by selecting the new “Enable Bulk Publish” toggle under Settings > General.

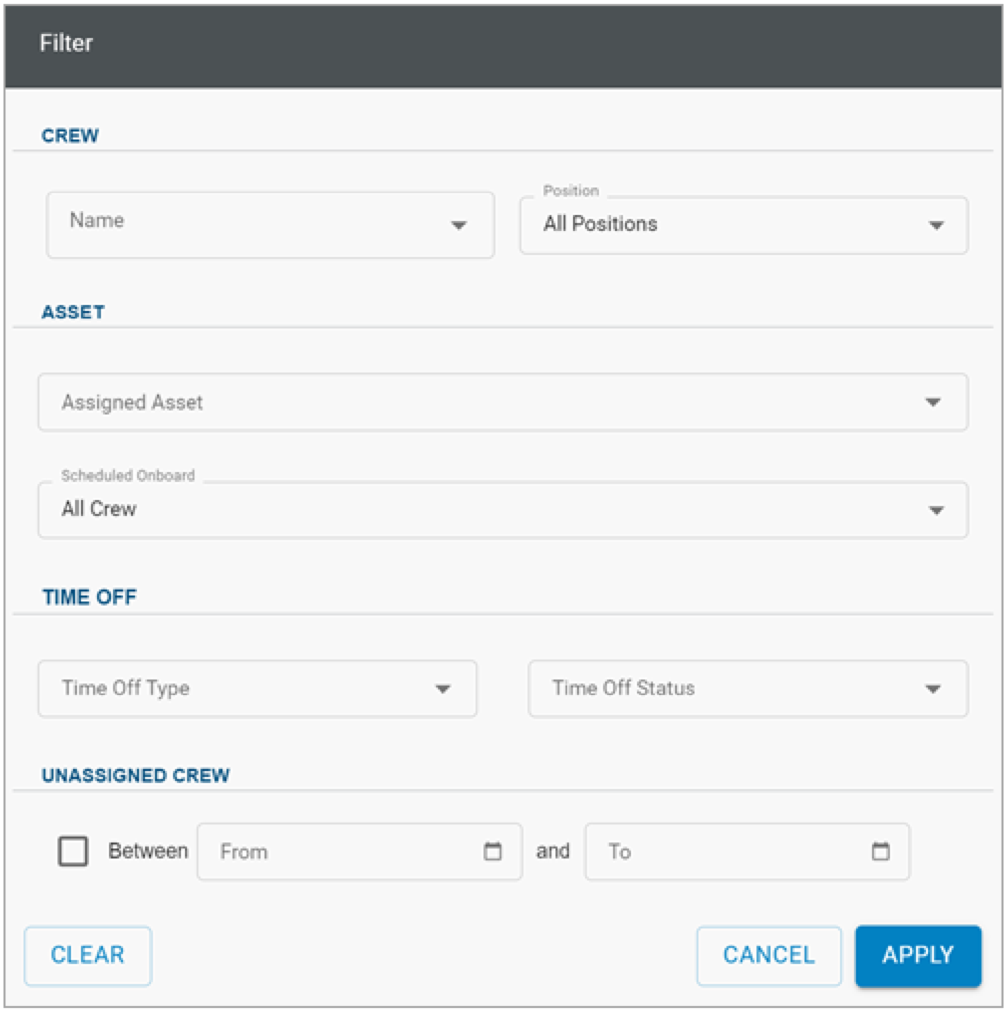


New Sorting and Filtering Options to Quickly Find the Crew You Need

To help you sort through your list of crew members and quickly find the ones you need, we added some new sorting options and filters to the Personnel > Schedule > Schedule > Crew sub-tab. First, we added two new options to the SORT list so you can sort by assigned asset.



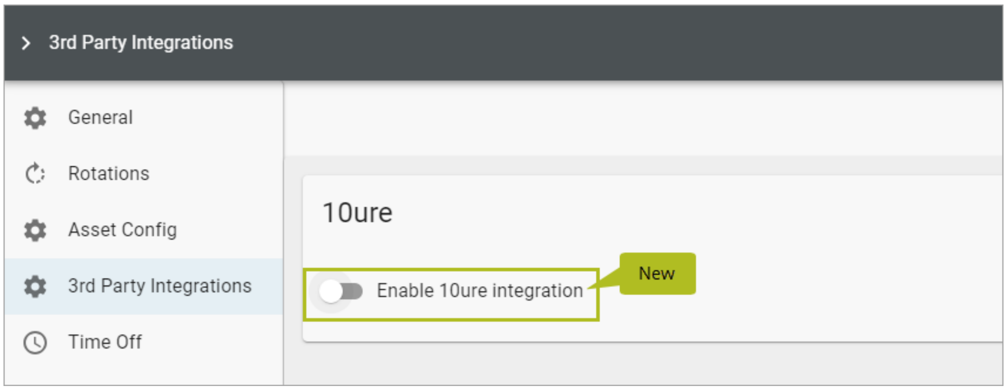
Then, we added a Filters icon to the toolbar that opens a new Filter window. We moved the View Mode and Position filters from the toolbar into the Filter window, and added new options for filtering by crew name, assigned asset, time off type, time off status, and a date range filter for finding unassigned crew.



Integration with 10ure

For those of you who use 10ure to post jobs and hire crew members, we added a handy new “Hire through 10ure” button to the Crew sub-tab that allows you to quickly open your 10ure dashboard in another window.

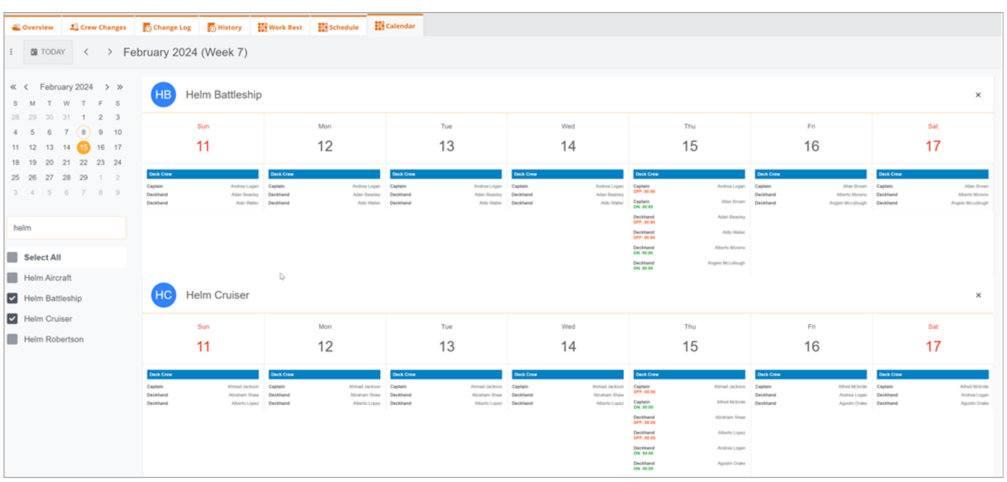
The new "Hire through 10ure" button will be off by default when you upgrade to Version 1.28, but you can turn it on by selecting the new "Enable 10ure Integration" toggle under Settings > 3rd Party Integrations.



Read-Only Calendar View

Available now as a pre-release for interested customers, the Personnel > Schedule > Calendar tab provides a calendar-style dashboard so you can quickly see who is scheduled onboard each asset on any day.

This new tab will not be turned on when you upgrade to Version 1.28. Please talk to your account manager if you'd like to learn more about this feature.



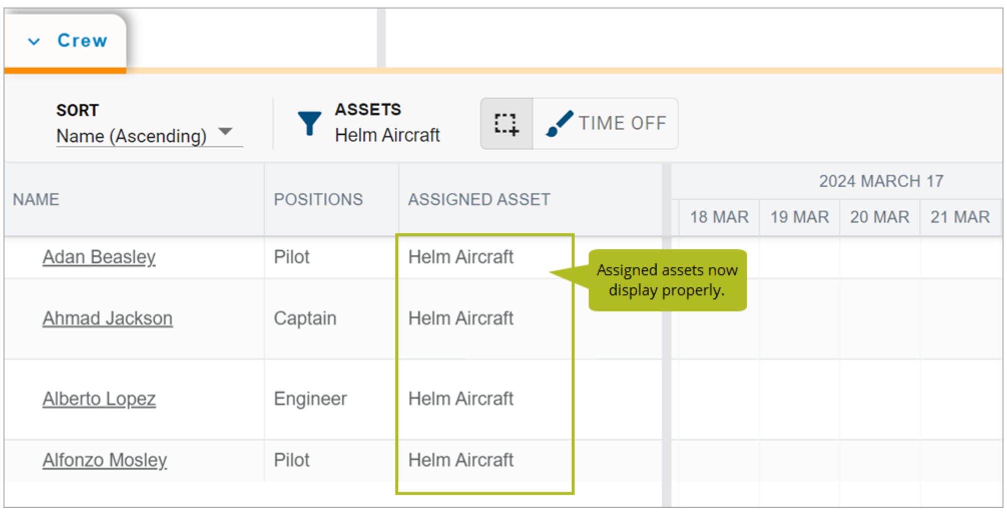
Read-Only Schedule for Your Crew

Available now as a pre-release for interested customers, the Onboard > Personnel > Schedule tab provides a read-only view of the published schedule for the crew onboard your assets.

This new tab will not be turned on when you upgrade to Version 1.28. Please talk to your account manager if you'd like to learn more about this feature.

Assigned Assets Now Display Properly

We addressed an issue on the Crew sub-tab where assigned assets weren't displaying properly.



Reports and Analytics

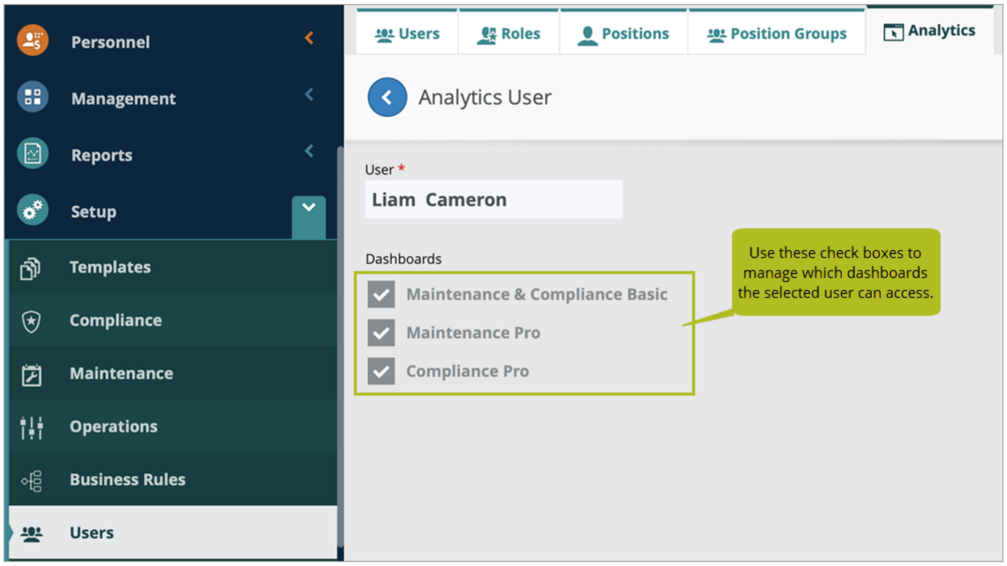
We made the following changes to our reports and Helm Analytics in this release. These changes may also affect report data linked to systems outside Helm CONNECT, such as Power BI. Please contact your account manager if you have any questions.

Improvements to Helm Analytics

Our latest update to Helm Analytics is loaded with improvements to help both our Basic and Pro users analyze their Maintenance and Compliance data:

- We now filter user data to their assigned division. This is critical for larger organizations with multiple operating areas and divisions.
- We streamlined which dashboards users can work with.
- We added iPad and Safari support.
- We improved performance by five times, especially on the initial load.

On the Setup > Users > Analytics tab, we also added a new Dashboards section to help you manage which dashboards are available to each of your users. Once you select someone's name from the User field, use the check boxes to manage which dashboards that person can access.



NOTE

The dashboards listed on your Analytics tab may not match the screenshot above; you will only see the ones to which you subscribe.

This article explains the simple configuration steps you must take before using Helm Analytics. Your account manager or our support team would also be happy to answer any questions or set up a demo for you.

New Tools to Manage Your Roles

We added two new tools to the Setup > Users > Roles tab to make it easier to review and manage all your roles in Helm CONNECT:

- **Search for roles**: We added a new search field to quickly find the role or roles you're looking for.
- **Export roles to Excel**: We added a new Export Roles button to export a list of all your roles and their related permissions to Microsoft Excel.

NOTE

Roles without any permissions won't be included in the report.

Changes to the Crew Certifications Data Source

We modified the behavior of the Hide Past Positions filter so it correctly displays only active positions. The following positions are all considered to be active:

- A position with no start or end dates
- A position with a start date before today but no end date
- A position with a start date before today and an end date after today

New Positions Data Source for Custom Fields

We added a Positions data source to our custom fields. This means that when you configure a custom field to be either a select box or a multi-select box, you can now choose Positions as the data source.

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).

New Legal Terms of Use for the Helm CONNECT API

We added a legal terms of use to our API documentation that accurately describes how we expect our API to be used and what services we provide. When you first view the API documentation, and every 30 days thereafter, we now display a blocking modal that requires you to read the terms and click “Accept Policy.”

Improvements to the API Documentation

We made the following improvements to our API documentation:

- We updated the documentation to refer to type names in a consistent fashion.
- We corrected the documentation for “`Archived`” on “`CreateOrUpdateCompany`”.

New Endpoints

- **Calculate Billing (api/v1/jobs/billing/calculatebilling)**: Supports POST only. Bills an order. Generates a transaction draft the same way the “Calculate” button does on the transactions screen.
- **Estimate Billing (api/v1/public/estimateBilling)**: Supports POST only. Bills an order, but instead of saving the result to the database, it will return the results.
- **Calculate Interval Billing (api/v1/jobs/billing/calculateintervalbilling)**: Supports POST only. Bills an billing interval. Generates a transaction draft the same way the “Calculate” button does when you generate billing for a billing interval.

- **Billing Intervals (api/v2/public/billingintervals)**: Supports GET only. Returns existing billing intervals in the system.
- **Request Pay (api/v2/public/requestpay)**: Supports GET only. Returns payroll requests and payroll adjustments. Filterable by any field (`Rate, Factor, Amount, Quantity, EarningCodeId, PayrollClassId, VesselId, PayrollPeriodId, Status, PersonId, RequestDate, Description`).

Create/Update Payroll Class Earning Code (api/v1/Personnel/PayrollClasses/CreateOrUpdatePayrollClassEarningCode)

When "`UseBaseRate`" is true:

- "`EffectiveDate`" and "`Rate`" are no longer required.
- You can only have one non-archived record.
- Creating a record sets all other non-archived records to inactive.
- Archiving a record automatically updates inactive records to become active.

> **NOTE**
> Our apologies, but we mistakenly reported these changes in our release notes for Version 1.27. They are actually part of Version 1.28.

Tasks (api/v2/public/Tasks)

We added a new "`Onboard`" value to the "`Source Type`" field.

Form Templates (api/v2/public/FormTemplates), Inspection Templates (api/v2/public/InspectionTemplates), Inventory Templates (api/v2/public/InventoryTemplates),

We added two new fields:

- "`GracePeriod`"defines the length of the grace period for that template's schedule.

- "`GracePeriodType`" defines whether that grace period length is in "`Days`" or "`Hours`".

Maintenance Templates (api/v2/public/MaintenanceTemplates)

We added three new fields:

- We added "`GracePeriod`" to define the length of the grace period for a date-based schedule for that template and "`GracePeriodType`" to define whether that grace period length for a date-based schedule is in "`Days`" or "`Hours`".
- Under "`Reading Types`" we also added a "`GracePeriod`" field to define the length of the grace period for a readings-based schedule for that template.

Updates

7.1.28.489

We addressed an issue that prevented an asset’s time zone from automatically updating when it changed time zones:

- For our Helm CONNECT Maintenance and Compliance customers, this issue prevented the due times on checklists and forms from automatically recalculating when an asset changed time zones.
- For our Logbook module customers, this issue prevented the asset time zone from displaying correctly when an asset changed time zones.

Affected version: 1.28.

7.1.28.488

This update included changes for our customers who use the new Voyages and Cargo and Fluid Tracking add-on features for the Logbook module:

- We addressed an issue that caused the Billing Logs report to include cargo and fluid amounts for all voyages instead of just the selected voyage.
- We addressed an issue that prevented the Daily Log report from showing the crew members coming off the selected asset.
- We improved the Billing Logs and Daily Log reports, so they now include logs for in-progress activities that start before the current day and end after the current day.

Affected version: 1.28.

7.1.28.485

We addressed a display issue in the Asset Tracking module that incorrectly caused some certifications in the Management > Assets list views to appear unsubmitted.

Release Notes: Version 1.28

Affected versions: 1.28 and earlier.

7.1.28.483 / 7.1.28.484

We addressed an issue with the Logbook report data source that caused an error when the Type filter was selected.

Affected version: 1.28.

7.1.28.482

For our Helm CONNECT Jobs customers, we released a performance improvement for generating billing on intervals.

Affected version: 1.28.

7.1.28.481

We addressed a display issue in the Asset Tracking module that incorrectly caused some old certifications to appear expired in Onboard > Overview.

Affected version: 1.28.

7.1.28.480

We addressed a display issue in Helm CONNECT Maintenance that incorrectly caused some checklists based on cumulative readings (for example, running hours) to appear overdue in workspaces in Onboard > Logs.

Affected version: 1.28.

7.1.28.479

We addressed an issue that was preventing some users from being able to log events in Onboard > Logs.

Affected version: 1.28.

7.1.28.478

We addressed an issue that was preventing the links from Helm CONNECT to external AIS tracking systems from working properly.

Affected version: 1.28.

7.1.28.476

We addressed an issue where asset installations could stop transferring data to shore in some scenarios.

Affected version: 1.28.

7.1.28.474

In Version 1.28, we introduced grace periods for our Helm CONNECT Maintenance and Compliance customers. The default sort order for items with grace periods in the work spaces in Onboard > Logs is by their due date, however, some of our customers would prefer for items to be sorted by the end date of their grace periods. For those customers, we added a new tenant-level permission in this update to allow their account manager to change the default sort order from due date to grace period end date.

NOTE IMPORTANT

Please be aware that if you ask your account manager to enable this permission in your tenant, it will apply to all of your users, regardless of their role-based permissions. Although you will see a new Onboard > Sort Spaces By Grace Period Date permission in the permission tree on your Setup > Users > Roles tab, this permission is not currently functional at the role level; it will make no difference if you add it to any of your roles.

Affected version: 1.28.