



Release Notes

Version 1.7

Copyright and Publication Information

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Contents

Copyright and Publication Information	2
The Helm CONNECT Platform	5
Template change logs temporarily disabled	5
Manually sync the data from asset installations to shore	5
Obtain a plain text download link for the asset installer	7
Limit users to assigned assets	7
Track employment history	8
Customize your list views	9
Enhancements to email notifications	9
Add a preferred name for people	10
Enhancements to global search	10
New read-only permissions	10
Helm CONNECT Maintenance	13
Print tasks	13
Enhanced design for lists of people	13
Add notes and attachments to parts	13
Look up the maintenance history of specific components	13
New behavior for component types	14
Add custom fields and numbering to requisitions	14
Link requisitions to an open task	15
Requisitions tab now defaults to the requisitions view	15
Set up vendors and vendor information	15
Reporting improvements	16
Helm CONNECT Compliance	17
Add multiple corrective actions to a form	17
Link requisitions to an open corrective action	17

Release Notes: Version 1.7

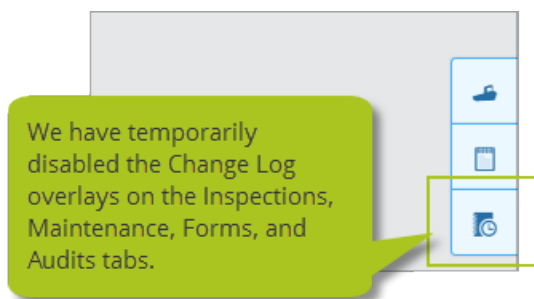
Print corrective actions	18
Enhanced design for lists of people	18
Reporting improvements	18
Helm CONNECT Jobs	19
Use custom accounting terms to generate due dates on your invoices	19
Planner improvements	19
Use the Actions menu to remove trips and jobs	20
View dispatch notes on draft transactions	20
New read-only permissions	20
Reporting improvements	21
Helm CONNECT API	23
New design for the API documentation	23

The Helm CONNECT Platform

We made the following changes to the Helm CONNECT platform with this release. These changes will affect most of our subscribers.

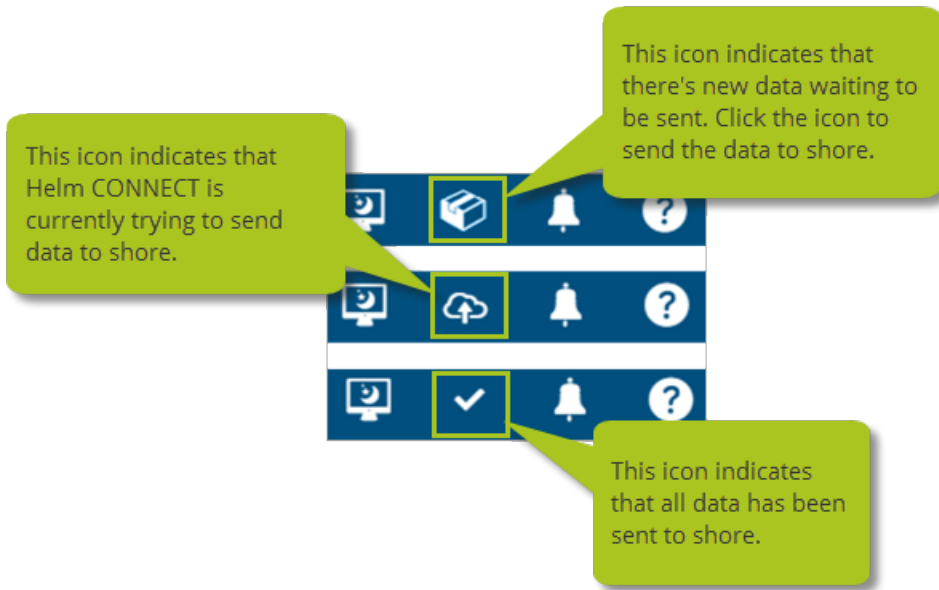
Template change logs temporarily disabled

Viewing the change logs for some templates can sometimes cause slow performance from the server, so we have temporarily disabled the change log overlays on the Inspections, Maintenance, Forms, and Audits tabs in *Templates*, on the Setup menu.



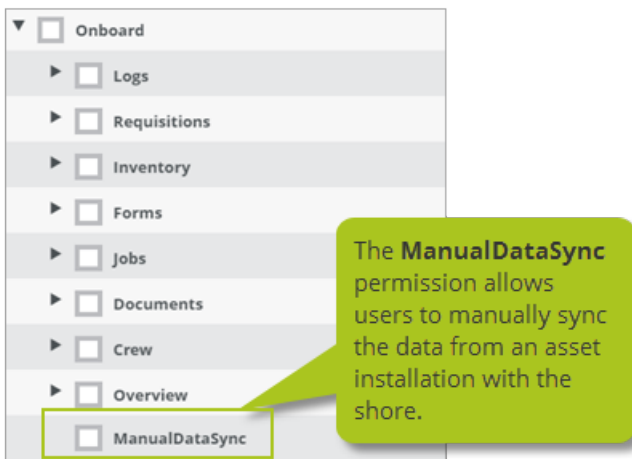
Manually sync the data from asset installations to shore

You now have the option to manually sync the data between an asset installation and the shore without waiting for the next automatic data sync. If you have permission to use this feature, you'll see one of the following new icons on the toolbar, depending on the current status of your data:



Note Manual data syncing doesn't interfere with automatic data syncing. If you manually send data to shore, the next automatic data sync will still happen on schedule.

From the Setup menu, you can assign permission to this feature on the Roles tab in Users.

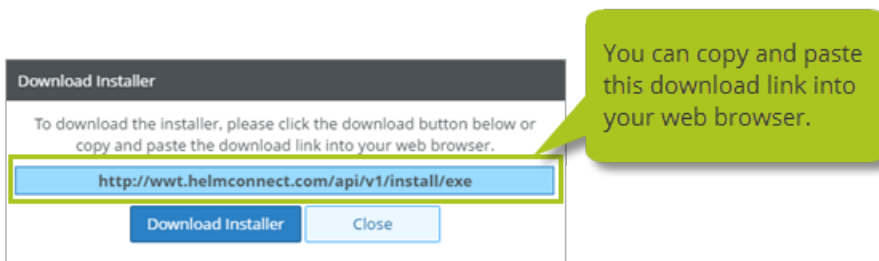




Note Remember that permissions are nested. If a role has access to the top level of a permission group, it has access to everything in that group.

Obtain a plain text download link for the asset installer

From the Setup menu, in Fleet, when you click **Download Installer**, we now give you the option to copy and paste a plain text download link into your web browser.



Limit users to assigned assets

You now have the option to assign users to specific assets and limit the information they can access from the Onboard menu in the browser version of Helm CONNECT. If assigned to a specific asset, a user will only be able to access information related to that asset.



Note This feature does not currently apply to any items associated with Helm CONNECT Jobs.

For this feature to work as expected, you must first ensure that all the following conditions apply:

- The user is either in the parent division or the same division as the asset they're assigned to.
- The user's role only gives them permission to items on the Onboard menu.
- The user hasn't already been assigned to an asset. Each user can only be assigned to one asset at a time, although you can reassign them whenever you need to.

To use this feature, follow these steps:

1. From the **Setup** menu, select **Users**.
2. On the **Users** tab, from the list of users, select the one you want to modify.
3. Click **Edit** then select the **Limit to Assigned Asset** check box.
4. Click **Save Changes**.
5. From the **Management** menu, select **Assets**.
6. On the **Assets** tab, from the list of assets, select the one you want to modify, then click the **Details** sub tab.
7. Click **Edit** then select the user's name from the **Assigned Crew** list.



Note A user can only be assigned to one asset at a time. If the user is already assigned to an asset, you must remove him or her from the other asset before you can reassign them to this asset.

8. Click **Save**.

Track employment history

From the Management menu, on the Details sub tab in People, we added a new Employment Details section that allows you to keep a record of the positions people have held in your company, including optional hire and termination dates for each position.

Position	Hire Date	Terminate Date
Deckhand 1	01/01/2016	12/31/2016
Deckhand 2	01/01/2017	Terminate Dat

Use the Details sub tab in People to manage the positions a person has held at your company.



Note A person's active positions affect their certifications as well as some of their maintenance permissions. Previously, all positions assigned to a person were considered active; in this release, positions are considered active only if one of the following conditions applies:

- Both the Hire Date and Terminate Date fields are empty
- The Terminate Date field is empty
- The current date is between the Hire Date and the Terminate Date

Customize your list views

You can now adjust the width of the columns in your list views, and decide which ones you want to hide or display. Your settings for each list will be saved by the system.

The screenshot shows a list view interface with a 'Column Selector' icon (gear) highlighted in a yellow box. A green callout box points to the icon with the text: "From any list view, click the **Column Selector** icon to hide or show each column, or to restore all the columns to their default width."

The dialog box is titled "Select Columns To Be Displayed" and has a "Default Width" link. It contains a table with the following columns: "Column Name", "Hide", and "Show".

Column Name	Hide	Show
Active	<input checked="" type="radio"/>	<input type="radio"/>
Category	<input type="radio"/>	<input checked="" type="radio"/>
Cross Reference	<input type="radio"/>	<input checked="" type="radio"/>
Part Number	<input type="radio"/>	<input checked="" type="radio"/>
Price	<input checked="" type="radio"/>	<input type="radio"/>
SAP Part Number	<input checked="" type="radio"/>	<input type="radio"/>
Unit	<input type="radio"/>	<input checked="" type="radio"/>

Enhancements to email notifications

We made the following enhancements to our email notification system:

- You can now change the lead times or responsible parties on a certification template, and the system will immediately update your notifications to reflect these changes. Previously, if you changed either the lead time or responsible parties on a certification template, your changes wouldn't affect the notifications until you renewed the certifications on that template.

- Notifications now display the latest, most current information. For example, if you update the name of someone in the system, any notifications about or for that person will display the correct name.
- The system no longer sends notifications about people or assets you've deleted from Helm CONNECT.
- The system no longer sends notifications to responsible parties who aren't active employees. In order to receive an email notification, a responsible party must be an active employee, be able to log in to Helm CONNECT, and have a valid email address in the system.

Add a preferred name for people

You can now add a preferred name to a person's record in Helm CONNECT. From the Setup menu, the new Preferred Name field is available on the Users tab in Users. From the Management menu, it's available on the Details sub tab on the People tab in People.

Enhancements to global search

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

- **People** Search by preferred names, as well as by first names, last names, middle names, employee numbers, email addresses, or phone numbers. You must have role-based permission to People to use global search for people.
- **Assets** Search by name, short name, or asset type. You must have role-based permission to Assets to use global search for assets.
- **Locations** You must have role-based permission to Locations to use global search for locations.

New read-only permissions

On the Roles tab, in Users on the Setup menu, you can now assign read-only permission to the following features:

- Setup > Users > Users:
 - Edit (full permission to the Users tab)
 - Read (read-only permission to the Users tab)

- Setup > Users > Roles:
 - Edit (full permission to the Roles tab)
 - Read (read-only permission to the Roles tab)
- Setup > Users > Positions:
 - Edit (full permission to the Positions tab)
 - Read (read-only permission to the Positions tab)
- Setup > Locations > Locations:
 - Edit (full permission to the Locations tab)
 - Read (read-only permission to the Locations tab)
- Setup > Locations > Locations Types :
 - Edit (full permission to the Location Types tab)
 - Read (read-only permission to the Location Types tab)

Helm CONNECT Maintenance

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

Print tasks

You can now print a task from the New Task or Update Task windows. Depending on your browser, you can also save a task as a PDF. The printed task will include all the information from the Task window, including the auto-generated task number, if applicable, as well as any notes or custom fields. If you subscribe to Helm CONNECT Inventory, the printed task will also include any parts used.

Enhanced design for lists of people

We enhanced most lists of people, such as the Inspected By, Assigned To, and Posted By lists, to display each person's employee number, if available, and any positions he or she has in Helm CONNECT. We also added a search field that allows you to search the list by the person's name or employee number.

Add notes and attachments to parts

On the Parts tab in Parts, on the Setup menu, you can now add notes and attachments to your parts. We also added new Notes and Attachments tabs to the Part Information window so other users can view these notes and attachments, although they can't add new ones from this window.

Look up the maintenance history of specific components

We renamed the Item filter on the maintenance History tabs to **Item, Component, Serial Number**. This filter now helps you look up the maintenance history of specific components by searching by the following information:

- **Item** You can search by any type of work listed in the Item column, such as completed maintenance routines, tasks, or component activation records.

- **Component** You can search by the description of a component.
- **Serial Number** You can search by the serial number of a component.



Note Depending on the size or resolution of your screen, you might need to click **Show all filters** to see the Item, Component, Serial Number filter.

New behavior for component types

As a result of the enhancements we made to components in this release, you'll notice new behavior for component types. Now, when you add a component, you won't be able to change its component type after you save it. If you must change a component type, we recommend you deactivate the component from the Management menu, in Assets, to remove it from your component tree. You can then add it again with the correct component type.



Note If you have any questions about this new behavior for component types, please contact your Account Manager.

Add custom fields and numbering to requisitions

On the Setup menu, we added a new item called **Requisitions** that displays the following tabs:

- **Requisitions Custom Fields** From this tab, you can add new custom fields that will apply to your requisitions. Any custom fields you add to your requisitions will be included in your reports.
- **Requisition Fields Configurations** From this tab, you can control which custom fields should be hidden or shown on your requisitions, and whether or not each one is required. You can also show or hide some of the default fields on your requisitions.
- **Line Item Custom Fields** From this tab, you can add new custom fields that will apply to the line items on your requisitions. Any custom fields you add to the line items for your requisitions will be included in your reports.

- **Line Item Fields Configurations** From this tab, you can control which custom fields should be hidden or shown on the line items for your requisitions, and whether or not each one is required.
- **Requisition Number Rule** From this tab, you can set up a number rule to automatically apply numbers to your requisitions. From here, you can define how you want the numbers to appear, including the prefix and suffix, the number of digits, and the starting number.

Link requisitions to an open task

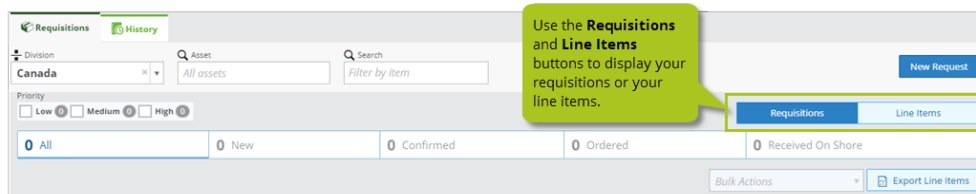
Near the top of your requisitions, we added a new Task field that allows you to link a requisition to an open task. Each requisition can only be linked to single task, but more than one requisition can be linked to the same task.



Note The Task list displays all the open tasks for the selected asset. If you also subscribe to Helm CONNECT Compliance, the list also displays the open corrective actions for the selected asset, as well as any corrective actions that aren't for any asset.

Requisitions tab now defaults to the requisitions view

On the Requisitions tab in Requisitions, on either the Onboard or Maintenance menu, we now display requisitions by default instead of line items. To switch from one view to the other, simply click either the **Requisitions** or the **Line Items** button.



Set up vendors and vendor information

You can now set up and manage your vendors in Helm CONNECT, including contact

information and custom fields for any extra details you want to track. Once you set up a vendor, you can add it to a task by selecting it from the Vendors list in the New Task or Modify Task windows.



Note As a result of these improvements, you won't be able to type the name of a vendor directly into the Vendors field in the New Task or Modify Task windows anymore.

For setting up vendors, we added three new tabs to Parts, on the Setup menu:

- **Vendors** From this tab, you can add new vendors to the system, including names, addresses, and contact information.
- **Vendor Custom Fields** From this tab, you can add new custom fields that will apply to your vendors. Any custom fields you add to your vendors will also be included in your reports.
- **Vendor Custom Fields Configurations** From this tab, you can control which vendor custom fields should be hidden or shown, and whether or not each one is required.

We also added a new Vendor data source for custom fields. For example, you could add a custom field to your parts or your requisitions that pulls from the vendor data source.

Reporting improvements

On the Reports menu, we added a new Components data source for our Maintenance reports.

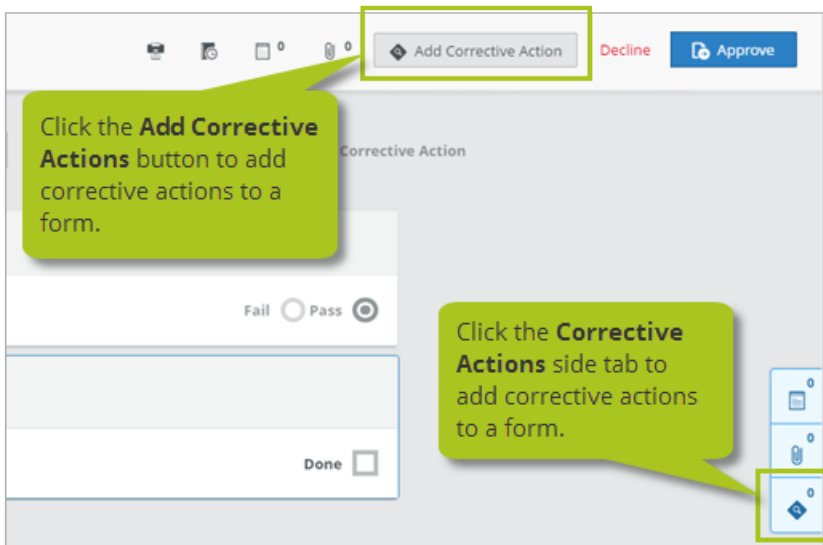
Helm CONNECT Compliance

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

Add multiple corrective actions to a form

Previously, you could only add a single corrective action to a form. You now have the option to add as many corrective actions to a form as necessary. You can do so in two ways:

- Click the existing **Add Corrective Actions** button at the top of the form to add the corrective actions associated with that form.
- Click the new **Corrective Actions** tab on the right side of the form to display the new Corrective Actions overlay. From here, you can view, search, update, and publish the corrective actions associated with that form.



Link requisitions to an open corrective action

If you also subscribe to Helm CONNECT Maintenance, you can now use the new Task field we added near the top of your requisitions to link a requisition to an open corrective

action. Each requisition can only be linked to single corrective action, but more than one requisition can be linked to the same corrective action.



Note The Task list displays all the open tasks and corrective actions for the selected asset, as well as any corrective actions that aren't for any asset.

Print corrective actions

You can now print a corrective action from the New Corrective Action or Finish Corrective Action windows. Depending on your browser, you can also save a corrective action as a PDF. The printed corrective action will include all the information from the Corrective Action window, including the auto-generated corrective action number, if applicable, as well as any notes or custom fields.

Enhanced design for lists of people

We enhanced most lists of people, such as the Filled By and Created By lists, to display each person's employee number, if available, and any positions he or she has in Helm CONNECT. We also added a search field that allows you to search the list by the person's name or employee number.

Reporting improvements

On the Reports menu, we added a new Documents data source for our Compliance reports. this report includes the date each document was acknowledged by someone using an asset installation, if applicable.

Helm CONNECT Jobs

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

Use custom accounting terms to generate due dates on your invoices

You can now create your own accounting terms and associate them with specific customers or accounts. The system will then generate due dates for your invoices based on the transaction date plus any associated accounting term. If there isn't an associated accounting term for the customer or account on a particular invoice, you can manually enter the due date on the invoice.

To set up your accounting terms, select **Sales** from the **Setup** menu, then use the following tabs:

- **Accounting Terms** From this new tab, you can create your own accounting terms.
- **Companies** From this tab, you can associate your accounting terms with specific companies or accounts.

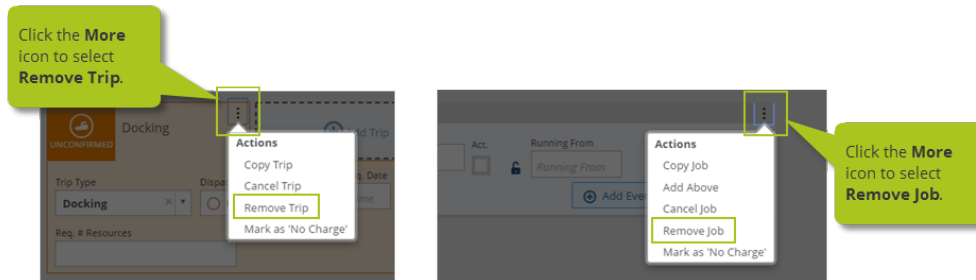
Planner improvements

On the Dispatch tab, we made the following improvements to the planner:

- Jobs with unassigned resources will now be grouped at the top of the planner.
- A new Sort Order list at the top of the planner allows you to sort resource lines by name (either ascending or descending).
- The tool tips for the jobs time bars now include the estimated duration of the job.
- If you drag a job to a new location outside the currently viewable area, the planner will now scroll.
- When a ship is assigned to a job or trip, a new Ship icon on the time bars displays a tool tip with information about the ship (Ship Type, GT, IMO, NT, LOA, DWT).
- A new Resource icon beside the resource name displays information about the resource (Name, Short Name, Division, Owner).

Use the Actions menu to remove trips and jobs

On the Trips tab, in Dispatch, on the Jobs menu, you now click the **More** icon to display the Actions menu in order to remove a trip or a job from the Trips tab.



View dispatch notes on draft transactions

On the Overview tab, in *Billing*, on the Jobs menu, you now view dispatch notes on draft transactions by clicking the **Notes** icon to display the Notes overlay.

New read-only permissions

On the Roles tab, in Users on the Setup menu, you can now assign read-only permission to the following features:

- Jobs > Dispatch > Basic:
 - Read-only dispatch (read-only permission to the Trips, Planner, and Template tabs)
 - Edit (basic permission to the Trips, Planner, and Template tabs)
- Setup > Jobs > Sales:
 - Edit (full permission to the Sales menu item, including all tabs)
 - Read (read-only permission to the Sales menu item, including all tabs)
- Setup > Jobs > Ships:
 - Edit (full permission to the Ships, Ship Types, and Cargo Types tabs)
 - Read (read-only permission to the Ships, Ship Types, and Cargo Types tabs)

- Setup > Jobs > Ships > Resources:
 - Edit (full permission to the Resources and Resource Types tabs)
 - Read (read-only permission to the Resources and Resource Types tabs)
- Setup > Users > Users:
 - Edit (full permission to the Users tab)
 - Read (read-only permission to the Users tab)
- Setup > Users > Roles:
 - Edit (full permission to the Roles tab)
 - Read (read-only permission to the Roles tab)
- Setup > Users > Positions:
 - Edit (full permission to the Positions tab)
 - Read (read-only permission to the Positions tab)
- Setup > Locations > Locations:
 - Edit (full permission to the Locations tab)
 - Read (read-only permission to the Locations tab)
- Setup > Users > Locations Types :
 - Edit (full permission to the Location Types tab)
 - Read (read-only permission to the Location Types tab)

Reporting improvements

On the Reports menu, we made the following improvements to our Jobs reports:

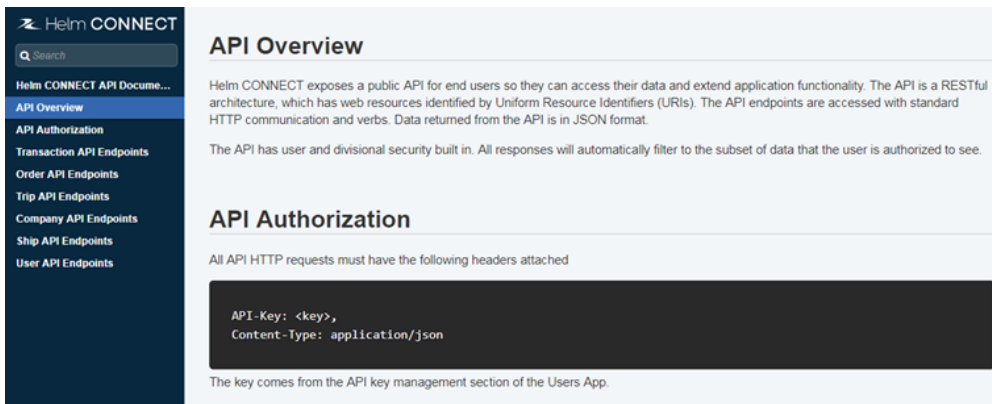
- Competitor Revenue Comparison reports now include the following fields:
 - Resource Name
 - Resource Owner
 - Ship Type
 - Trip Type
 - Job Start Date
- Event Logs reports now include the Resources field.

Helm CONNECT API

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

New design for the API documentation

We now host our API documentation online, and have improved the design and layout to include an outline and a full text search.



For more information about the Helm CONNECT API, please contact your account manager.

