Release Notes

Version 1.8

Copyright and Publication Information

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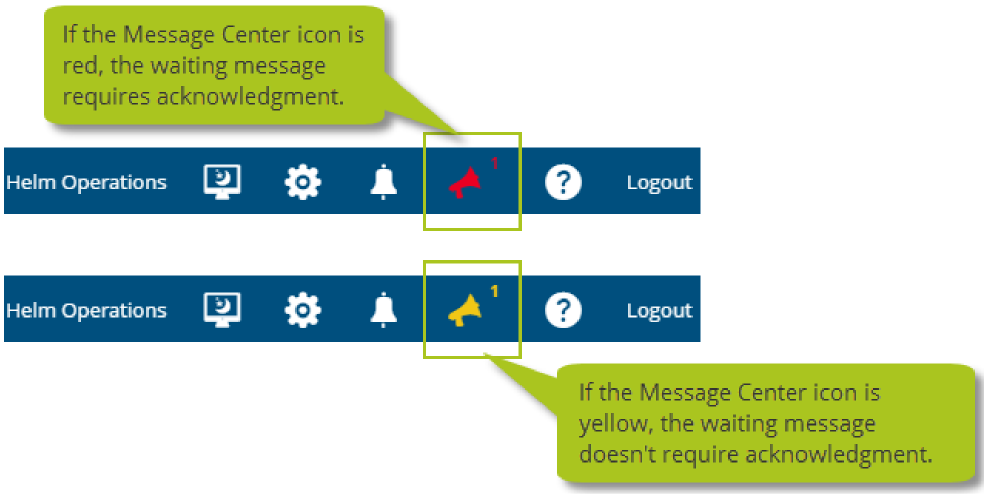
Contents

The Platform

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

Introducing the new message center

Hi! We'll soon be sending you important messages—such as news about upcoming releases or reminders about maintenance updates—in your new message center. In the upper right corner of your screen, beside the Help icon, you'll see the new Message Center icon. When there's something waiting for you, the icon will turn either red or yellow, and you can simply click the icon to read your message.



Data streaming for asset installations

We now stream the data between asset installations and the shore. Sending data as a sequence of items instead of as one big chunk will improve data transfer for many of our customers, especially those whose assets sometimes experience poor or intermittent Internet connections.

Repair tool for asset installations

If something isn't working with one of your asset installations, you can now try to repair the installation files before resorting to uninstalling and reinstalling Helm CONNECT. This new option is especially useful for customers whose assets sometimes experience poor or intermittent Internet connections, because it doesn't require them to download all their data again.

To run the Helm CONNECT repair tool, follow these steps:

1. From the Windows Start menu (Windows 7 or Windows 10) or the Windows Start screen (Windows 8), search for "Add or remove programs."
2. From the list of programs, right-click **Helm CONNECT** and select **Change**.
3. Click **Repair Helm CONNECT**.

Template change logs are back

In Version 1.7, we temporarily disabled the change log overlays on the Inspections, Maintenance, Forms, and Audits tabs in *Templates*, on the Setup menu, because viewing these change logs sometimes caused slow performance from the server. In Version 1.8, the template change log overlays are back and we've improved how they work. Now, if you click the Change Log button on any of the template tabs, the system will display up to 20 results in the Change Log overlay. If there are more results available for that template, you can click the new Load More button to display the next 20 results.

Additional option for assigning people to assets

Previously, you could only assign people to assets from *Assets*, on the Management menu. Now, you also have the option of assigning them from *People*, on the Management menu.

To assign someone to an asset from *People*, follow these steps:

1. From the **Management** menu, select **People**.
2. On the **People** tab, from the list, select the person you want to assign, then click the **Details** sub tab.

3. Click **Edit** then select the person's name from the **Assigned Asset** list.

   Note A person can only be assigned to one asset at a time. If he or she is already assigned to another asset, you must first remove him or her from the other asset.

4. Click **Save**.

Helm CONNECT Maintenance

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

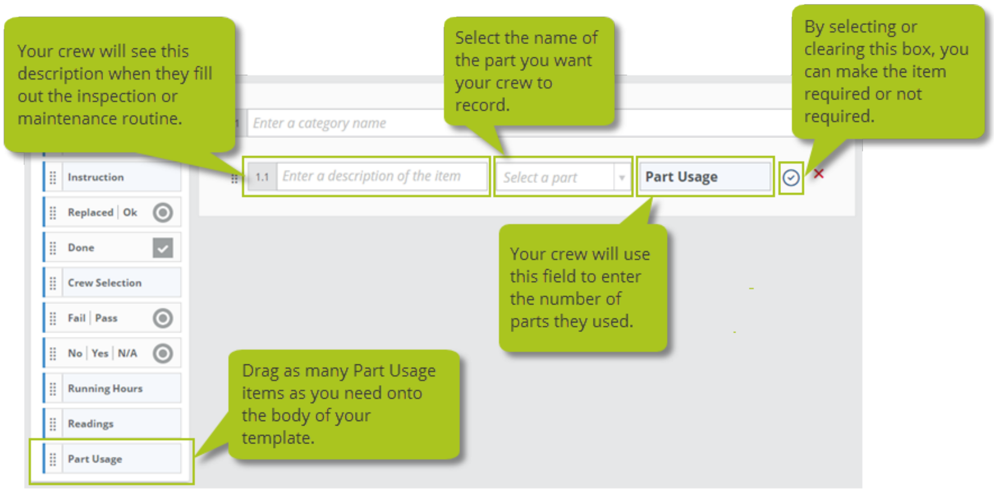
Assign tasks to multiple assets

If you want to send the same task to several assets at once, instead of having to create a separate task for each asset, you can now create one task and simply assign it to multiple assets. As soon as you click Finish or Create Task, the system will create a copy of the original task for each assigned asset. If you have a number rule set up for your tasks, the system will also give each task a unique number.

Note This feature is only available if you're working from the browser version of Helm CONNECT. If you're working from the installed version, you can't assign a task to any assets other than the one you're working on.

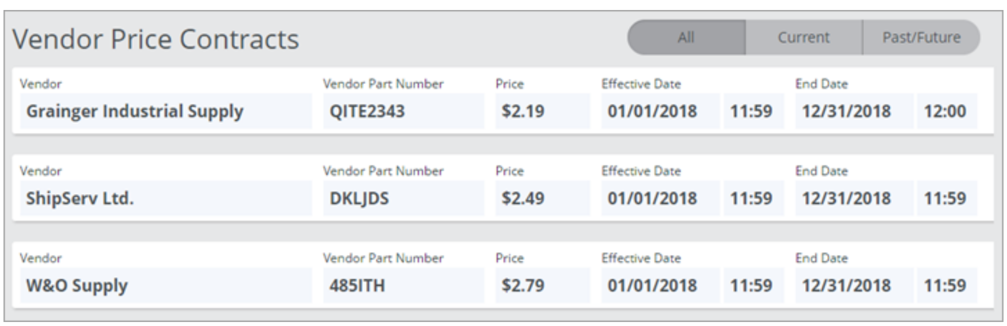
Record parts used during inspections and maintenance routines

Your crew can now record any parts they use while filling out inspections or maintenance routines. If you subscribe to Inventory, the system will automatically deduct the parts used from your inventory. To use this feature, while you're building or editing an inspection or maintenance template, simply drag the new Part Usage item type onto the body of the template and complete the necessary fields.



Manage vendor price contracts for parts

On the Parts tab in *Parts*, on the Setup menu, you can now set up and manage vendor price contracts for your parts. Each price contract includes an effective date and an optional end date. Although you can have multiple contracts for one vendor on a single part, the dates on those contracts can't overlap.

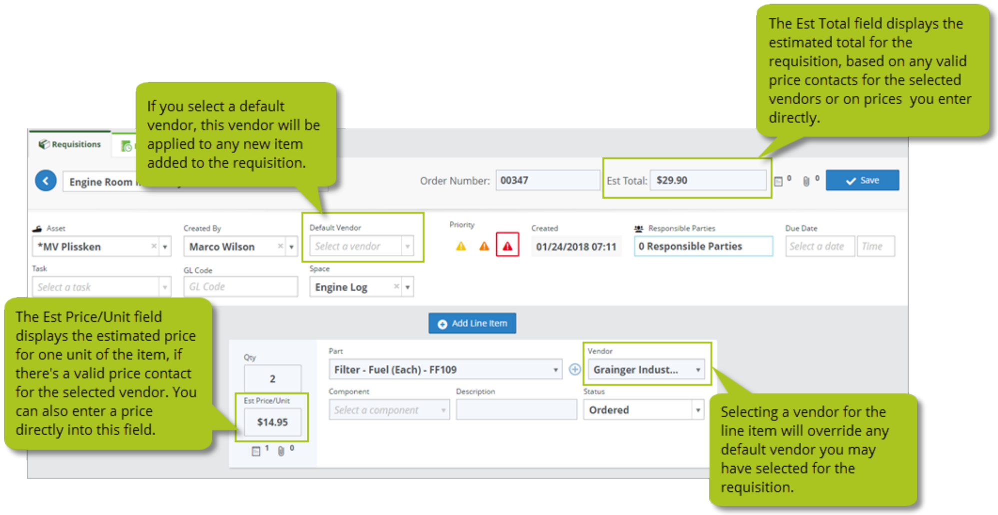

Vendor Price Contracts

All | Current | Past/Future

Vendor	Vendor Part Number	Price	Effective Date		End Date	
Grainger Industrial Supply	QITE2343	$2.19	01/01/2018	11:59	12/31/2018	12:00
ShipServ Ltd.	DKLJDS	$2.49	01/01/2018	11:59	12/31/2018	11:59
W&O Supply	485ITH	$2.79	01/01/2018	11:59	12/31/2018	11:59

Estimate prices on requisitions

If you're using the new vendor price contracts feature, when you create a requisition, the system will now estimate the price of the requisition based on any valid price contracts you have for the selected vendor or vendors.



Use parts received on your assets to update inventory

If you subscribe to Inventory, when you change the status of a requisition or a line item to "Received on Asset", the system will now ask if you'd like to add the received parts to your inventory.

Enhanced template management

In *Templates*, on the Setup menu, we made some changes to help you manage long lists of templates:

- At the top of each tab, you'll notice a new collection of filters to help you quickly find the specific template or templates you're looking for. The system will remember your filters if you click away from the tab or even if you log out of Helm CONNECT.

  Note Depending on the size and resolution of your screen, you may need to click **Show all filters** to see all the available filters.

- We significantly improved the performance on all the tabs. If you have a large number of templates, you'll notice much faster loading times.

Enhanced number rules

We made several enhancements to Maintenance number rules:

- **Manage all your number rules from a single setup area** The new Number Rules tab in *Operations*, on the Setup menu, replaces both the Task Number Rule tab in *Tasks* and the Requisition Number Rule tab in *Requisitions*.
- **Create new types of number rules** In addition to tasks and requisitions, you can also set up number rules for your inspections, maintenance routines, and inventory counts. For tasks and requisitions, number rules are applied as soon as the item is created and saved. For inspections, maintenance routines, and inventory counts, number rules are applied as soon as you open a new copy of the item.
- **Apply rules to a single type or to multiple types of work** For each number rule you create, you can decide whether it applies only to one type of work, or it applies to more than one type of work. For example, you could have one number rule that applies to your tasks and another one that applies to your requisitions, or you could have one number rule that applies to both.

Note If you also subscribe to Helm CONNECT Compliance, you can create number rules that apply to both maintenance and compliance items.

Quickly see any overdue requisitions or line items

When you create a requisition, you now have the option of adding a due date that applies to all the line items in that requisition. To help you sort your items quickly, we added a new Overdue filter to the Requisitions tab in *Requisitions*, on both the Onboard and Maintenance menus. We also added the number of overdue items to the asset cards on the Dashboard tab in *Requisitions*, on the Maintenance menu.

Created By field is now required on requisitions

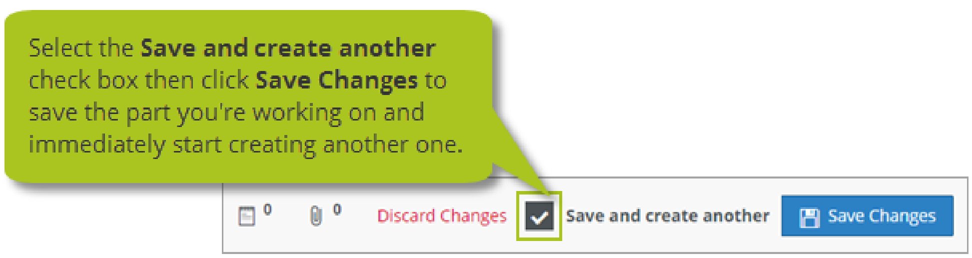
When you create a requisition, you're now required to complete the Created By field.

Change component types when necessary

As a result of the enhancements we made to components in Version 1.7, we removed the ability to change a component type after you saved the component. With this release, you can now change component types when absolutely necessary. However, if you do change a component type, please be aware that if another user is changing the same component at the same time, or if a user with an asset installation changes the component and then syncs the data, your changes could be overwritten.

Quickly save a new part and add another one

On the Parts tab in Parts, on the Setup menu, when you add a new part, you now have the option to save the new part and immediately add another one.

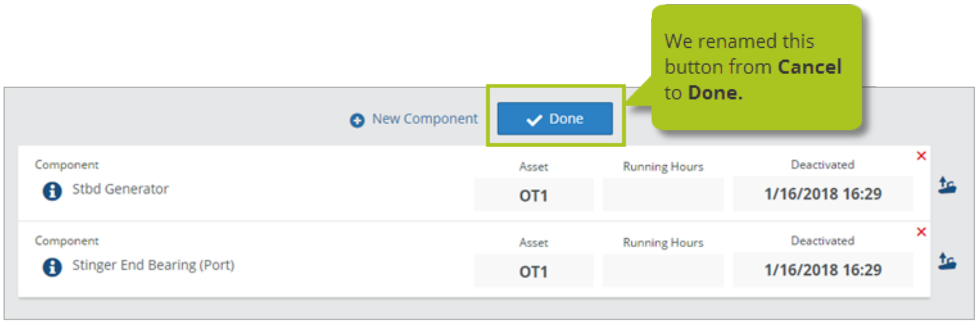


All essential systems now called critical systems

Throughout Helm CONNECT, we have changed all "Essential Systems" labels to "Critical Systems."

Better label for the Cancel button

On the Components tab, in *Inventory*, on either the Onboard or the Inventory menu, when you're adding or modifying a component, you no longer have to click Cancel to leave edit mode. To reassure you that none of your changes will be lost when you click that button, we changed the label from **Cancel** to **Done** and made the button blue instead of red.


We renamed this button from **Cancel** to **Done.**
New Component
Done
Component
Stbd Generator
Asset
OT1
Running Hours
Deactivated
1/16/2018 16:29
Component
Stinger End Bearing (Port)
Asset
OT1
Running Hours
Deactivated
1/16/2018 16:29

Helm CONNECT Compliance

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

Record parts used in forms

We added a new Part Usage item type to form templates so, if you also subscribe to Helm CONNECT Maintenance, you can now get your crew to record any parts they use while filling out a form. If you subscribe to Inventory, the system will deduct the parts used from your inventory automatically.

To use this feature, while you're building or editing a form template, simply drag the new Part Usage item type onto the body of the template and complete the necessary fields.

Enhanced number rules

We made several enhancements to Compliance number rules:

- **Manage all your number rules from a single setup area** The new Number Rules tab in *Operations*, on the Setup menu, replaces the Task Number Rule tab in *Tasks*.
- **Create new types of number rules** In addition to corrective actions, you can also set up number rules for your forms. The rules are applied when the item is completed, submitted, or finished.
- **Apply rules to a single type or multiple types of work** For each number rule you create, you can decide whether it applies only to a single type of work or to multiple types. For example, you could have one number rule that applies to your corrective actions and another one that applies to your forms, or you could have one number rule that applies to both.

Note If you also subscribe to Helm CONNECT Maintenance, you can create number rules that apply to both maintenance and compliance items.

Enhanced template management

In *Templates*, on the Setup menu, we made some changes to help you manage long lists of templates:

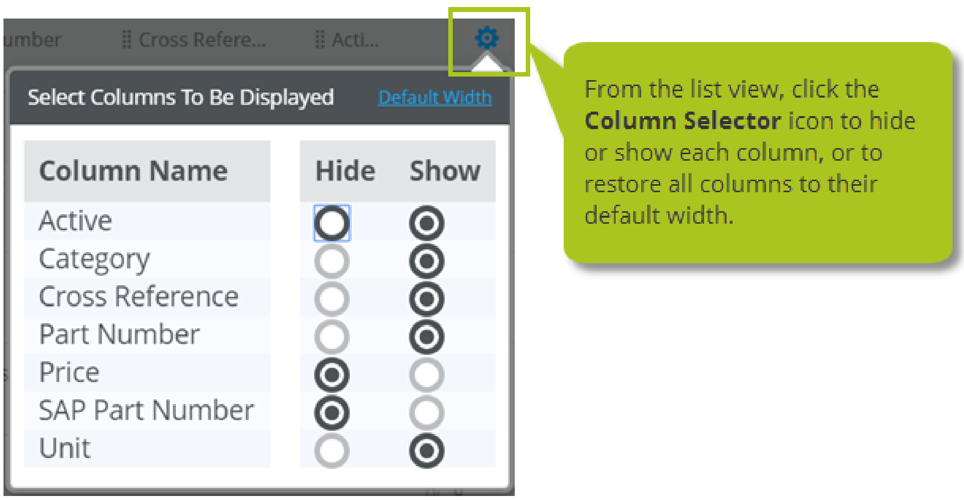
- At the top of each tab, you'll notice a new collection of filters to help you quickly find the specific template or templates you're looking for. The system will remember your filters if you click away from the tab or even if you log out of Helm CONNECT.

Note Depending on the size and resolution of your screen, you may need to click **Show all filters** to see all the available filters.

- We significantly improved the performance on all the tabs. If you have a large number of templates, you'll notice much faster loading times.

Customizable columns for your list of audit templates

In Version 1.7, in *Templates*, on the Setup menu, you could customize the displayed columns on the Inspections, Maintenance, Inventory, Requisitions, and Forms tabs. In this release, you can now customize the columns on the Audits tab as well. This means you can adjust the width of the columns and decide which ones you want to hide or display. The system will remember your settings if you click away from the tab or even if you log out of Helm CONNECT.



Include No/Yes/NA questions on forms

We added a new No/Yes/NA item type to form templates. If you also subscribe to Helm CONNECT Maintenance, and someone selects No when filling out a copy of the form, the system will create a new task.

All essential systems now called critical systems

Throughout Helm CONNECT, we have changed all "Essential Systems" labels to "Critical Systems."

Helm CONNECT Jobs

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

Grouping feature temporarily removed from the dispatch planner

In Version 1.7, we introduced a feature to the dispatch planner that grouped jobs with unassigned resources at the top of the planner. Unfortunately, this feature has been causing significant performance issues for customers who make heavy use of the planner. Until we can fully address this problem, we have disabled the grouping feature on the planner.

New competitor order estimates are now calculated automatically

On the Trips tab in *Dispatch*, on the Jobs menu, the first time you generate a billing estimate based on a competitor's default tariff, you no longer have to click the Update button. Instead, the system will now automatically generate the estimate. However, if you modify the order, you must still click Update to include your changes in the estimate.

Weekly fuel tables now use correct end dates

Previously, on the Fuel Tables tab in *Tariffs*, on the Jobs menu, if you set a weekly frequency for a fuel table, the system would incorrectly set the end date to seven days later. Now the system correctly sets the end date to six days later.

Changes to transactions

We made the following changes to transactions:

- You can now edit the Customer PO # field only from the Invoice sub tab.
- If you modify the Customer PO # field on the Invoice sub tab, your change will now be reflected on the Related Transactions, Rev'd Invoice, Rev'd Related Trans, and Revenue Allocations sub tabs.

- If you reverse any related transactions, you will no longer see the purple Reversed label on the Related Transactions sub tab.

Add notes to billed orders from the Trips tab

On the Trips tab in *Dispatch*, on the Jobs menu, you can now add notes while editing an order, even if the order has already been billed.

Correct Save icon in the Save As Template window

On the Trips tab, in *Dispatch*, on the Jobs menu, if you click Save As Template, you'll notice that the Save button is now using the correct icon.

Set holidays up under Operations instead of under Invoicing

On the Setup menu, we moved the Holidays tab from *Invoicing* to *Operations*.

New behavior for transaction emails

If the system can't send one or more transaction emails, you'll now see a notification explaining what happened and listing the transactions that couldn't be sent. You'll then be prompted to wait five minutes before trying to send any of those transactions again.

Increased character limit for Email Addresses field

On the Companies tab in *Sales*, on the Setup menu, we increased the character limit for the Email Addresses field to 1000.

Helm CONNECT Tracking

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

Enhanced template management

In *Templates*, on the Setup menu, we made some changes to the Personnel Certifications and Asset Certifications tabs to help you manage long lists of templates:

- We replaced the search bar with a new Template filter. You can now filter the displayed list by a template name, or even part of a name. The system will remember your filter if you click away from the tab or even if you log out of Helm CONNECT.
- We significantly improved the performance on both tabs. If you have a large number of templates, you'll notice much faster loading times.

Reports

We made the following changes to our reports with this release.

Changes to our data sources

Components

- The Asset Name field now indicates whether or not an asset has been deleted.

Corrective Actions

- We renamed the Essential System field to Critical System.

Event Logs

- Customers who subscribe to the Event Logs add-on but don't subscribe to Helm CONNECT Jobs will now be able to use the Event Logs data source.

Forms

- We renamed the Essential System field to Critical System.
- We added a new Form Number field.

Inventory History

- We renamed the Inventory History data source to Parts History

Maintenance Checklists

- We renamed the Essential System field to Critical System.
- Under Item Values, we added a new Part group to display available information about any parts recorded on a maintenance routine, including custom fields.
- Under Item Values, we added a new Template Category group. The Name field in this group displays a category name.
- We added a new Checklist Number field.

Inspection Checklists

- Under Item Values, we added a new Part group to display available information about any parts recorded on an inspection, including custom fields.
- Under Item Values, we added a new Template Category group. The Name field in this group displays a category name.
- We added a new Checklist Number field.

Inventory Checklists

- Under Item Values, we added a new Part group to display available information about any parts recorded on an inventory count, including custom fields.
- Under Item Values, we added a new Template Category group. The Name field in this group displays a category name.
- We added a new Checklist Number field.

Requisitions

- We added new fields for Estimated Price, Estimated Total Price, Default Vendor, and Due Date fields.
- We added a new Component Critical System field to indicate whether related components are critical systems.

Tasks

- We renamed the Essential System field to Critical System.

Vendor Part Prices

- We added a new data source called Vendor Part Prices.

Updated query for connecting data sources to other tools

For those of you who connect our report data sources to other tools, such as Microsoft Excel or Microsoft Power BI Desktop, we recently updated our recommended query so cells that contain line breaks no longer create new records. You'll find the updated query in both the online help and the Helm CONNECT Report Guide.

Updates

Following is a list of updates we made to Version 1.7, that we also included with Version 1.8. Some customers may have already received some or all of these updates. If you have any questions, please contact your account manager.

Update 25

In the Asset Tracking or People Tracking modules, if you update the details on a certification that has already been renewed at least once, there is no longer a chance that the system will use the wrong information to calculate its expiry date.

Update 24

In our reports, if you include any location fields in your reports, the system now displays the correct data.

Update 23

We made the following changes to Helm CONNECT Jobs in this update:

- If a resource logs the running from and running to times for a job as zero, this value is now displayed correctly on any associated transaction lines and in reports.
- If the system can't send one or more transaction emails, you'll now see a notification explaining what happened and listing the transactions that couldn't be sent. You'll then be prompted to wait five minutes before trying to send any of those transactions again.
- On the Companies tab in Sales, on the Setup menu, we increased the character limit for the Email Addresses field to 1000.

Update 22

If you make any manual changes before using our API to export your transactions to an external system, Helm CONNECT now correctly rounds all the transactions to two digits.

Update 21

In Version 1.7, we introduced a feature to the dispatch planner in Helm CONNECT Jobs that grouped jobs with unassigned resources at the top of the planner. Unfortunately, this feature has been causing significant performance issues for customers who make heavy use of the planner. Until we can fully address this problem, we have disabled the grouping feature on the planner.

Update 20

Customers who installed Helm CONNECT on Windows computers with a limited amount of free memory may find that maintenance checklists won't load their current running hours and will eventually display a timeout error. This update addresses that issue and should improve the speed and performance of maintenance checklists.

Update 19

We made the following changes to our reports in this update:

- Some users were unable to duplicate reports shared with them, if the report was created by a user in a different time zone.
- Reports based on the Competitor Revenue Comparison data source were displaying all data, even when date filters were set. While fixing this issue, we added a Division filter. Divisions help you control the data your users can access in Helm CONNECT.

We made the following changes to Helm CONNECT Jobs in this update:

- When opening draft billing transactions, some users were prompted to save the transaction, even if they hadn't made any changes.
- Dates were inconsistently handled in the Bulk Submit Transactions window. If the Transaction Date was left blank for a group of transactions, the Transaction Date on all transactions was overwritten with the current date, even if individual transactions had existing transaction dates. Now, Transaction Date works in the following ways:
    - If you leave Transaction Date blank in the Bulk Submit Transactions window, transactions with existing dates are not changed and transactions without dates are set to the current date. The Transaction Date in this window is now blank by default.

- If you enter a Transaction Date in the Bulk Submit Transaction window, the Transaction Date on all associated transactions is set to the date entered, even if individual transactions had existing dates or were blank.

Update 18

We fixed an issue where the running from and running to times that came in from a resource using an installation of Helm CONNECT would correctly update the job on shore, but wouldn't be displayed correctly on any associated transaction lines after billing. This problem didn't happen if the times were updated directly by someone on shore.