Release Notes

Version 1.10

Copyright and Publication Information

Contents

The Platform

Our "platform" is our base product, and includes the features and functionality shared by all our customers, such as the Reports menu. Changes to our platform affect everyone, regardless of the product lines or modules you subscribe to.

New IMO and MMSI fields for assets and resources

On the Assets tab in *Assets*, on the Management menu, we added two new fields to your asset profiles: IMO and MMSI. For resources, you'll find the new fields on the Resources tab in *Ships*, on the Setup menu.

Note If you were previously using custom fields to track IMO and MMSI numbers and have any questions about these new fields, please contact your account manager.

Seamless integration with AIS tracking systems

All subscribers can now use a pre-configured link to an AIS tracking system to quickly locate their assets from within Helm CONNECT. In addition, Helm CONNECT Jobs subscribers can also locate ships and resources. This feature makes use of the new IMO field on the Assets tab in *Assets*, on the Management menu. By entering a valid IMO number in that field, you will enable the new Vessel Tracking button on that asset's card on the Asset tab.

Click the Vessel Tracking button to locate this asset with the default AIS tracking system.
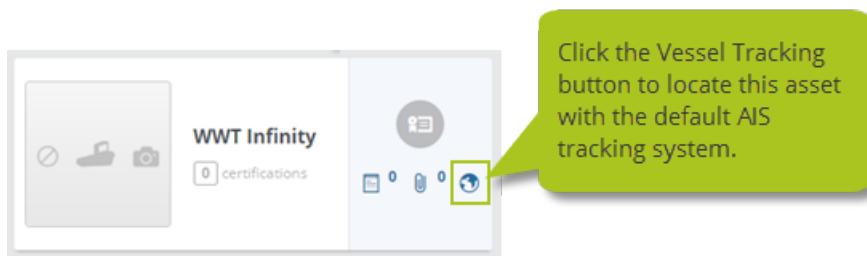
NoteBy default, Helm CONNECT is configured to use the IMO field, and integrates seamlessly with a custom tracking system provided by ShipTracks, our preferred vendor. If you have questions about this configuration or about using the MMSI field instead, please contact your account manager.

Expand or collapse the Employment Details section

In *People*, on the Management menu, we added a new icon to the Employment Details section that allows you to expand or collapse a person's positions. When the list is collapsed, you'll still the person's current positions, which are those that either haven't yet reached their end dates or that have no end dates at all.

Include special characters in global search

When you use global search (Alt + g), you can now include special characters such as "*" or "&".

New date filters for reports

We added some new date filters to the following reports data sources:

- **Inspections Checklists**: we added Due Date, Approved Date, and Declined Date filters
- **Maintenance Checklists**: we added a Due Date filter
- **Inventory Checklists**: we added a Due Date filter

Once you select any of these data sources for your report, you'll see the new filters in the Filter On list.

Component custom fields included in reports

If you have custom fields for your components, you can now include them in reports that use the following data sources:

- Components
- Corrective Actions
- Maintenance Checklists
- Tasks

Reports can now include custom fields with deleted entries

Previously, you couldn't run a report if any custom fields in that report contained an item that had been deleted. Now you can.

Helm CONNECT Maintenance and Helm CONNECT Compliance

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

More control for overdue checklists and forms

We made several enhancements to simplify the way we handle due dates and put you in control of your overdue maintenance and compliance items.
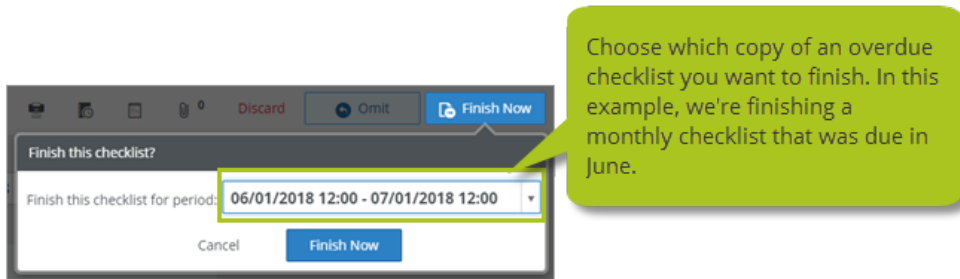
Simplified due dates for new templates

Previously, when you based the schedule for a maintenance, inspection, inventory, or form template on an effective date, it was hard to tell when the first copy was due. Now, when you build a new template, the system calculates all missed copies of the template that occurred since the effective date. For example, if today is July 24 and you publish a new daily inspection template with an effective date of July 1, the system will immediately calculate all the missed inspections since July 1. If you don't want all those missed inspections to stack up, simply choose an effective date that's the same as or closer to the current date. Keep in mind that you'll still see only the earliest or most overdue item in your To Do list, but trust us, the other ones are there!

Complete overdue checklists and forms

You now have the option to complete overdue maintenance routines, inspections, inventory counts, or forms. Let's say it's July, and one of your monthly inspections wasn't completed in June. Previously, if you tried to finish the overdue inspection from June, you'd actually be finishing the July inspection. This was confusing and meant there was no record of the June inspection in history. Now, if you perform that monthly inspection and click **Finish Now**, you can choose the June inspection that you missed.

> **Note** This feature only applies to checklists and forms with schedules based on the effective date, not on the last completed date.

Choose which copy of an overdue checklist you want to finish. In this example, we're finishing a monthly checklist that was due in June.

Omit overdue checklists and forms

If you have to miss some regular maintenance or compliance work—perhaps for a dry dock or some downtime—you now have the option to omit the overdue items. To keep you in compliance, each omitted item stays in history with the reason it wasn't completed. You'll find the new Omit button above your checklists beside the Finish Now button.

Note This feature only applies to checklists and forms with schedules based on the effective date, not on the last completed date. You'll only see the Omit button for checklists that can be omitted.

If you can't complete some scheduled work, you can omit it. A record of the item will remain in history.
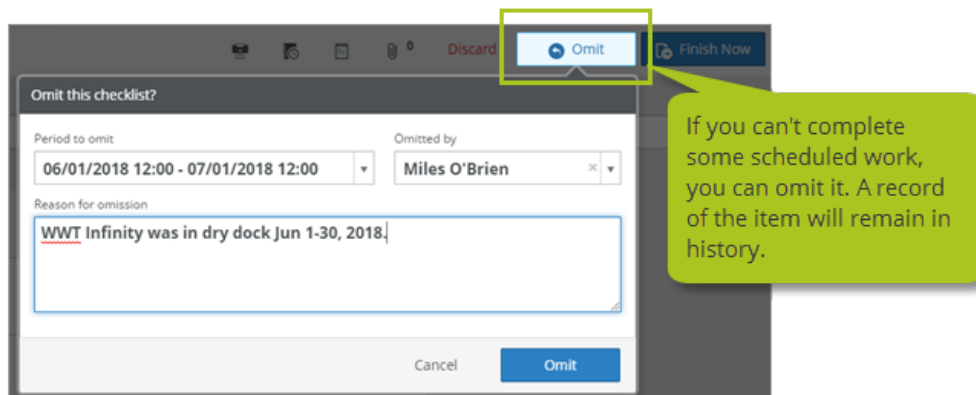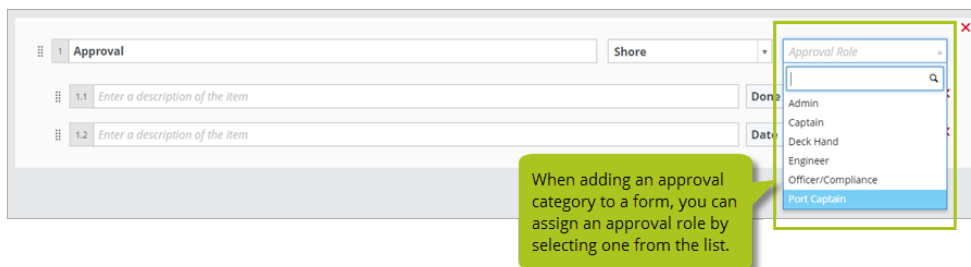
Role-based approvals on forms

To restrict some of the approval sections on your forms so they can only be completed by specific types of users, you can now assign a role to each of those approval sections. For example, you could have an approval section that can only be completed by a port captain.

Take advantage of this feature on the Forms tab in *Templates*, on the Setup menu, when you build or edit a form.

Note This is an optional feature. If you already had forms with approval sections prior to version 1.10, and you'd like to assign roles to any of them, you can simply edit them on the Forms tab in *Templates*, on the Setup menu.

When adding an approval category to a form, you can assign an approval role by selecting one from the list.

Optional corrective actions for audit observations

Corrective actions are now optional for observations made during an audit, although they are still required for findings.

Expand and collapse the sections in your forms library

For any of you with a growing list of items in your forms library, you'll be happy to hear that you can now collapse the In Progress, Awaiting Approval, and Library sections on the Library tab in *Forms*, on the Compliance menu. Simply use the new arrow icon beside each section's name to collapse or expand that section. The system will remember your settings if you leave the Library tab or log out of Helm CONNECT.

Include longer instruction fields on templates

In *Templates*, on the Setup menu, we increased the limit for the Instruction fields to 2500 characters.

Enter larger numbers in inventory counts

We now allow you to enter numbers of up to nine digits when completing inventory counts.

Inspection and Maintenance templates no longer save automatically

To improve performance and make our template library more consistent, we removed the automatic save feature from our two oldest template types: inspections and maintenance templates. If you're working on an inspection or maintenance template, you now have to click Save Draft if want to save your changes without publishing them.

## Installations column removed from Document Control tab

Some users with large numbers of documents were experiencing performance issues when they tried to display the Document Control tab in *Documents*, on the Compliance menu. To address the issue, we removed the Installations column from this tab. However, you can still see whether or not someone using an asset installation has received or acknowledged a specific document by selecting the document from the list, then clicking the Asset icon in the upper right of the tab.

Helm CONNECT Jobs

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

Now button

The Now button allows you to quickly enter the current date and time. You can use this new button when you add a new event or activity, as well as in the dispatch and billing screens throughout Helm CONNECT Jobs. Just hover near the top of the calendar to display the new button, which is hidden by default.
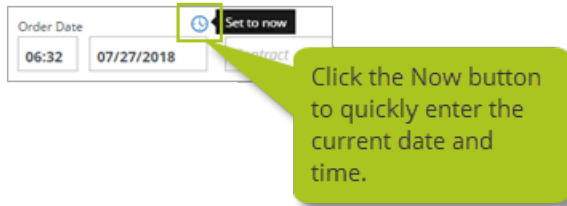
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Note If you were previously using custom fields to track IMO and MMSI numbers and have any questions about these new fields, please contact your account manager.

Additional change logs now available

You can now view change logs in the following places from the Setup menu:
- When viewing an individual company on the Company tab in *Sales*.
- When viewing an individual ship on the Ship tab in *Ships*.

- When viewing an individual resources on the Resources tab in *Ships*.

A few formatting changes

We fixed up a few fields that—to our critical eyes—seemed a little misaligned:
- The header fields on the Activity Types tab in *Events*, on the Setup menu.
- The Archive and Save as Template fields in the Edit Order form.

Tariff Defaults button is now a new tab

We removed the Tariff Defaults button from the Tariffs tab in *Tariffs*, on the Jobs menu, and created a new Tariff Defaults tab in *Invoicing*, on the Setup menu. If you had permission to use the Tariff Defaults button, you'll automatically have permission to this new tab.

Separate permissions for each Invoicing tab

You can now assign separate permissions for each of the tabs in *Invoicing*, on the Setup menu. You can assign these permissions on the Role tab in Users, on the Setup menu.
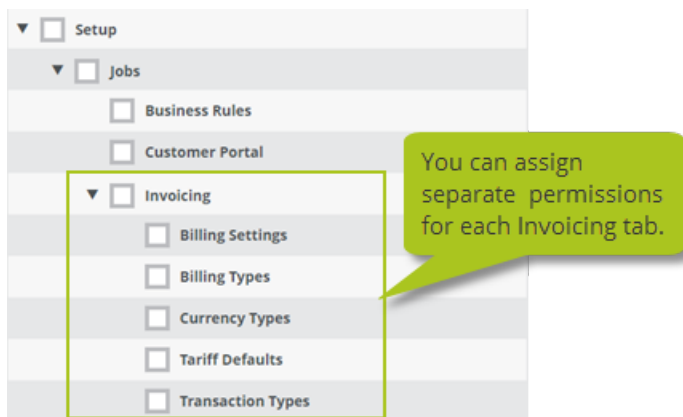
Users with read-only permission for tariffs can now view them

If you have read-only permission for tariffs, you'll now be able to view them correctly.

Bulk Add Order window displays same fields as Order window

When adding a bulk order, you'll now be able to see the same fields you configured for a single order, although you still won't be able to add job-level fields from this window.

Change invoice style after creating a draft invoice

You can now change the invoice style, if necessary, after you've generated a draft invoice.

New scroll bar in the expanded row for trips

A new horizontal scroll bar on the Trips tab in *Dispatch* allows you to comfortably view large amounts of information.

Include special characters in global search

When you use global search (Alt + g), you can now include special characters such as "*" or "&".

Attach notes and documents to partially billed orders

You can now attach notes and documents to an order throughout its life cycle, from order to invoice.

Helm CONNECT Personnel

Introducing Payroll! This powerful new module addresses the unique marine use cases that mainstream payroll systems often overlook:

- Manage all your pay rates and pay classes in a central system
- Trigger pay rates according to your company's rules, including regular, overtime and holiday pay
- Forecast payroll based on your approved schedules
- Automatically generate payroll once crew schedules are approved
- Automatically top up to a full paycheck using accumulated time off
- View total days and dollars paid for your entire crew

To learn more about Payroll and all the other changes we made to Helm CONNECT Personnel with this release, or to book a demo, please contact your account manager.