# Release Notes

Version 1.11

# Copyright and Publication Information

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# 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.

## Configure fields for Assets and People

For *Assets* and *People*, on the Management menu, you now have more control over many of your fields:

- **Configure fields in the sidebar** You can now show or hide any of the fields on the sidebars, including custom fields. You can also rearrange the order in which they're displayed. By default, any custom fields you added before Version 1.11 will be hidden on the sidebars.
- **Configure custom fields in the profile area** You can show or hide the custom fields on the Details sub tabs. You can also rearrange the order in which they're displayed. By default, any custom fields you added before Version 1.11 will be shown in the profile area.

To configure your assets and people fields, we added a new *Field Configurations* item on the Setup menu. It contains an Assets tab to manage the fields related to assets and a People tab to manage the fields related to people. The Assets and People tabs each have two sub tabs:

- **Sidebar** This allows you to configure all the fields on the sidebars for the Details sub tab, including custom fields.
- **Details** This allows you to configure the custom fields in the profile area of the Details sub tab.

**Note** The new Field Configurations item on the Setup menu is available to all our customers at no extra cost, however, it's turned off by default at your tenant level. Please contact your account manager if you'd like to have it turned on.

## Messages sort correctly in the Message Center

The messages in the Message Center are now sorted by the date and time we sent them to you, not the date and time when you opened them.

# Helm CONNECT Maintenance and Helm CONNECT Compliance

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

## Introducing Advanced Search!

In this release, we're introducing Advanced Search, a flexible, customizable tool that allows shore-side users to design custom searches to meet their needs. Use it to search your assets' open or overdue maintenance and compliance items, including maintenance routines, inspections, inventory counts, forms, tasks, and corrective actions. With this new tool, you can either search on-the-fly or use previously saved searches. You can also share your saved searches with other users.

## Apply running hours to grouped components

You can now have the option to group sets of components together on your maintenance templates. Then, when your crews complete their maintenance routines, they'll have the option to apply the running hours to the entire group, instead of just to individual components.

## Send declined forms back for corrections

Previously, if you declined a form, it went straight to history. From there, you could see why it had been declined, but you didn't have the option to send it back for corrections or to be resubmitted. In this release, when you decline a form, you have the option to send it back to the previous step with a note describing the corrections you need.

## Use planned crew changes to trigger forms

If you subscribe to both Helm CONNECT Compliance and Helm CONNECT Personnel, you can use a new Crew Change Type item in form templates. The new item allows you to set up specific forms to be automatically added to your crews' To Do lists in Logs when planned crew changes are recorded on your assets.

## Improved workflow for displaying history

To improve speed and performance, we changed the way we display data on the History tabs. Previously, each time you selected a new filter, such as the name of an asset or a date, the system would immediately start trying to display your data. And each time you selected another filter, it would start over again. This put a heavy strain on the system and made history quite slow for some customers, especially those with large amounts of data. Starting in this release, select all your filters first then click the new **Apply Filters** button to display your data.

## Improvements to checklists and forms

We made the following improvements to checklists and forms in this release:

### No longer finish checklists or forms for a future time period

To help ensure your records are accurate and you remain in compliance, you can no longer select a future time period when finishing an inspection, survey, maintenance routine, inventory count, or form.

### Repeat a checklist or form

If you have already finished a particular inspection, survey, maintenance routine, inventory count, or form for all its available time periods, you now have the option to repeat it without affecting its next due date. When you repeat a checklist or form, you'll see a warning that you're about to repeat the checklist and add another copy to history.

## Enhancements to documents

In this release, we added the following tools to help you use your documents library more efficiently:

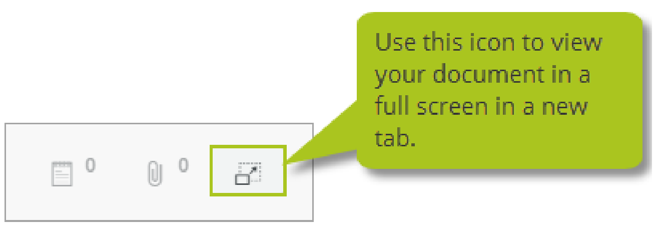
### Search your documents

You can now search for a specific word or words in an open document in your document library.


**Note** The search tool only works on PDF documents that include a text layer. If you're not sure, a simple way to test your document is to try and highlight some text. If you can highlight the text, the document includes a text layer.

### View documents in a full screen

If you've ever found it difficult to read one of your documents in the preview area in your document library, you'll be pleased to know you that you can now open any document in a separate tab so you can see it in a full screen.




## Enhancements to auto-numbers

We made the following changes to auto-numbers in this release:

### All labels for auto-numbers changed to External Number

For consistency throughout Helm CONNECT, we changed all the labels for automatically-generated numbers, such as "Task Number" or "Checklist Number," to "External Number."

**External numbers no longer missing from some email notifications**
You'll now see external numbers on the email notifications you receive when you're assigned a checklist as well as the one you see if you click the Finish Task button in a notification.

**View the fleet number for an installation**
When external numbers are assigned to work performed on an asset installation, Helm CONNECT adds a pre-fix to represent the installation. This fleet number prevents conflicts when data is synced with the shore. However, in prior releases, it was difficult to know which number represented each installation. In this release, we added a new Fleet Number column to *Fleet*, on the Setup menu, so you can look up the numbers assigned to your installations.

## Enhancements to requisitions

We made the following changes to requisitions in this release:

**Created date and time not displayed on requisitions templates**
For consistency with our other templates, we removed the created date and time from requisitions templates.

**All saved requisitions must have a line item**
The system will now make sure you've added at least one line item before it lets you save a requisition.

**Price doesn't disappear from line items**
Prior to this release, if you added a line item to a requisition then entered the price before selecting a part, the price would disappear as soon as you selected a part. This doesn't happen any more.

## Enter recorded dates and names of auditors on audits

In *Compliance*, when completing either an internal or an external audit, you must now record the name of the auditor as well as the actual recorded date.

**Note** The names in the new Auditors list are based on the active employees on the Users tab in *Users*, on the Setup menu. For advice on setting up your list of auditors, please contact your account manager.

## Option to deactivate vendors

On the Vendors tab in *Parts*, on the Setup menu, we added a new Active check box so you can control whether each of your vendors is active or inactive. If a vendor is inactive, you won't be able to select its name in any vendor-related lists or fields.

## Quickly see which users are set to Limit to Assigned Asset

On the Users tab in *Users*, on the Setup menu, a new Limit to Assigned Asset icon now lets you quickly see which users have this setting.

## Include all forms in reports from your form library

On the Library tab in *Forms*, if you click the Report button, you can now report on all your historical forms. Previously, only the shore-only forms were included in the report.

## Improved visibility for triggered forms

To make sure your crew don't overlook any forms, any triggered forms, such as forms triggered by events or planned crew changes, now appear in the In Progress section of the Library tab in *Forms*, on the Onboard menu, as soon as they're triggered by an event. Previously, these forms were easier to miss because they didn't display on the Library tab until someone started filling them out in *Logs*.

## Activity-based maintenance works with all checklists

In version 1.10, we made a change that impacted activity-based maintenance. If an activity-based checklist didn't have a due date, such as an on demand checklist, a dry dock inspection, or a maintenance routine based on running hours, that checklist would always appear in your crew's To Do list, even if their asset wasn't currently performing the linked activity.

In version 1.11, we fixed this problem and activity-based maintenance now works correctly with all checklists.

# Helm CONNECT Jobs

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

## Quickly see the billing information for your transactions

In *Billing*, when you generate a draft invoice, you can now click the new Billing Info icon beside each transaction line to quickly see how any transaction was calculated. From the Billing Info window that displays, you can click an item to see more details.

**Note** You can only view billing information for transactions generated after the upgrade to version 1.11.

## Only bill for completed or canceled trips

To make sure you only include completed or canceled trips on your invoices, you can no longer include unconfirmed or confirmed trips when viewing an order from the Overview tab in *Billing*.

## Planner buttons and filters display correctly in Internet Explorer

If you're working in Internet Explorer, you'll notice the buttons and filters in the header area on the Planner tab now display properly.

## Faster loading time for trips

We significantly improved the loading time for the Trips tab in *Dispatch*.

## Duplicate an address

When you duplicate the address for an account on the Companies tab in *Sales*, on the Setup menu, the system will now duplicate all the fields correctly and will no longer display an error message.

# Helm CONNECT Personnel

Here are just a few of the changes we made to Helm CONNECT Personnel in this release:

## View change logs

We added two new Change Log tabs:

- In *Schedule*, you can now see when someone adds, edits, or deletes any crew changes, crew change people, work periods, or hitches.
- In *Payroll*, you can now see when someone manually adds, edits, or deletes any payroll transaction lines or bank records.

## Integrate with forms

For those of you who subscribe to both Helm CONNECT Personnel and Helm CONNECT Compliance, you can now:

- Use planned crew changes to trigger forms.
- Quickly add all your current crew members to a form by clicking the new Add Current Crew button.

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

# Reports and custom fields

We made the following changes to our reports and custom fields in this release.

## People data source no longer shows an extra Position column

When building a report using the People data source, you may notice we no longer list the Positions column twice. The second Positions column wasn't supposed to be there.

## Tasks data source now includes status filter

A new Status filter on the Tasks data source now allows you to select a status of Open, Closed, or Deleted to narrow down the displayed data.

## Corrective Actions data source now includes status filter

A new Status filter on the Corrective Actions data source now allows you to select a status of Open, Planned, Closed, or Deleted to narrow down the displayed data.

## Vendor Part Prices data source now includes Active column

We added a new Active column to the Vendor Part Prices data source to indicate whether a particular vendor is active or inactive.

## New Repeat column for some data sources

We added a new Repeat column to following data sources to indicate whether a checklist or form was repeated:

- Forms
- Inspection Checklists
- Inventory Checklists
- Maintenance Checklists

## New data sources for Personnel reports

We added two new data sources for Personnel reports:

- **Onboard Crew** This data source lists the crew onboard during a specified time frame.
- **Available Crew** This data source lists the crew who aren't working during a specified time frame.