



Release Notes

Version 1.12

Copyright and Publication Information

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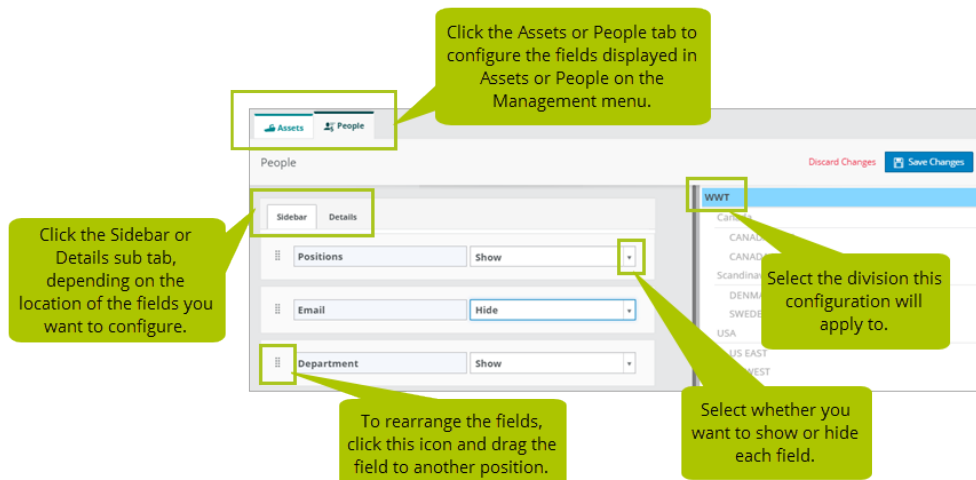
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The platform

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.

Additional fields can now be configured for People

Field Configurations on the Setup menu allows you to configure the fields for *Assets* and *People* on the Management menu by division.



In this release, on the People tab, we added the following fields to the Sidebar sub tab:

- Employee Number
- Assigned Asset
- Phone Numbers
- Onboard Status



Note The 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.

Enhanced global search for people

You'll notice the following enhancements when you use with global search (Alt + g) to find people:

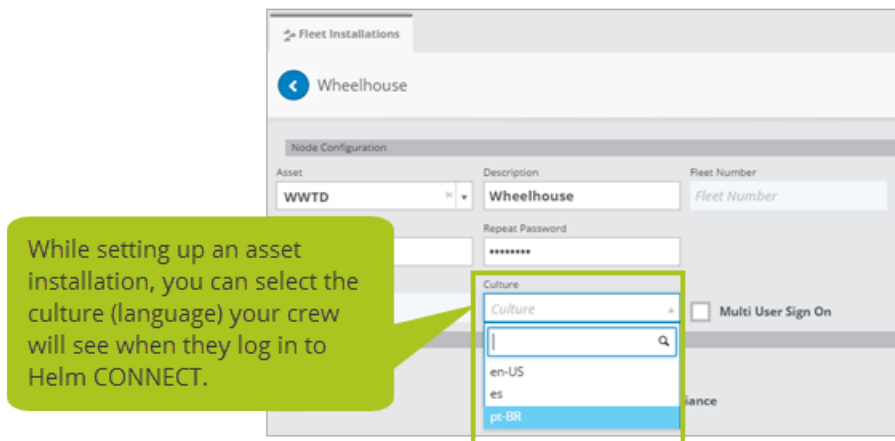
- To make it easier to see who is an active employee and who isn't, we added an "Inactive" label beside the name of anyone not flagged as an active employee on the Users tab, in *Users*, on the Setup menu.
- Instead of showing an error message if you select the name of someone you don't have permission to view, we changed the way the list works. So, for example, if you don't have permission to the Users tab, in *Users*, on the Setup menu, you simply won't be able to select the name of anyone who isn't an active employee.

Edit people in inactive divisions

On the People tab, in *People*, on the Management menu, you can now edit the profile of a person who belongs to an inactive division.

Select a culture for asset installations that use shared sign on

You can now select a culture (language) for asset installations that use shared sign on. This means that everyone who logs into the asset installation will see Helm CONNECT in the selected culture. If your asset installation uses multi-user sign on, each user will see Helm CONNECT in the culture selected on their user profile.

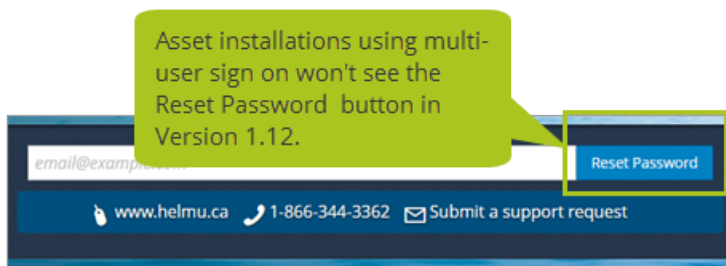




Note Helm CONNECT is currently available in three languages: English, Spanish, and Portuguese. For more information, please contact your account manager.

No Reset Password button for asset installations that use multi-user sign on

If you're working on an asset installation that uses multi-user sign on, and you click More Help on the login screen, you may notice we removed the Reset Password button. Unfortunately, this feature hasn't been working properly, so we had to temporarily remove the button so we can fix it. Don't worry, we'll put it back in our next release! If you have any questions about this, please contact your account manager.



Note Don't worry, you can still reset a password if you're working from shore. We only removed the Reset Password button for asset installations.

Helm CONNECT Maintenance and Helm CONNECT Compliance

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

Advanced Search is here!

In our previous release, we introduced Advanced Search, a flexible, customizable tool that allows shore-side users to design custom searches to meet their needs. When we first release it, we added Advanced Search as an item on the Maintenance menu. Now, in Version 1.12, we moved the two Advanced Search tabs—Advanced Search and Manage Searches—into Overview on the Maintenance menu.

Enhancements to requisitions

We made some significant enhancements to our Requisitions module in this release:

- **Set up role-based approval for requisitions.** You can now assign the ability to approve requisitions above a set dollar amount to one or more roles in your organization. Requisitions that need approval are marked with the status 'Awaiting Approval'.
- **Link requisitions to open items.** Previously, you could link your requisitions to open tasks or corrective actions. Starting in Version 1.12, you can also link your requisitions to inspections, maintenance routines, inventory counts, and forms. We also made it easier for you to search and find the items that you want to link your requisitions to.
- **Request labor more easily.** We made it easier to request labor in a requisition. Now, when you are entering items in a requisition, you can toggle between the part fields and labor fields. When you switch a line item over to Labor, you'll see a Labor description field instead of the parts list, and an estimated price in \$/hour, instead of \$/units.
- **Handle partial shipments.** Previously, there was no easy way to handle partial shipments, where you received some but not all items requested. Now, you can split a line item to record the items that arrived, and track the remaining items in a new line

item. You have the option to copy any notes and attachments from the original line item to the split line item.

- **Auto-number each line item.** To better support integration with external purchasing systems, you can now configure Helm CONNECT to auto-number each line item in your requisitions. Previously, you could only assign a number to the entire requisition. If you have configured external numbers for your requisitions, the system will now automatically number all your line items as well. For more about auto-numbers, check out our [Automatically number your maintenance and compliance items](#) article.
- **Change the order of line items.** You can now change the order of the items within a requisition. Group them by price, or by type, or by vendor, whatever order makes the most sense to you.

Add optional corrective actions to forms

You now have the option to add corrective actions to any forms that include a shore approval category. Previously, you could only add corrective actions to forms that required them.

Fields on requisition line items aren't locked until you save

Requisition line items had a funny quirk where, if you changed their status to Received on Asset, Canceled, or Closed, all fields were immediately locked and you couldn't make any more changes. This behavior took many users by surprise, so we changed it. Now when you're working on a line item, changing the status won't affect anything until you click Save.

Improvements to tags

To help you locate, track, and report on your maintenance and compliance items, we made several improvements to tags in this release.

Add tags to inspections, maintenance, and inventory templates

You can now add tags to inspections, maintenance, and inventory templates. These tags will also be applied to any checklists based on these templates. Previously, you could only add tags to the checklists themselves, not to the templates. Any tags you add to the tem-

plates or the checklists can also be included in reports that use the new Inspection Templates, Maintenance Templates, and Inventory Templates data sources.

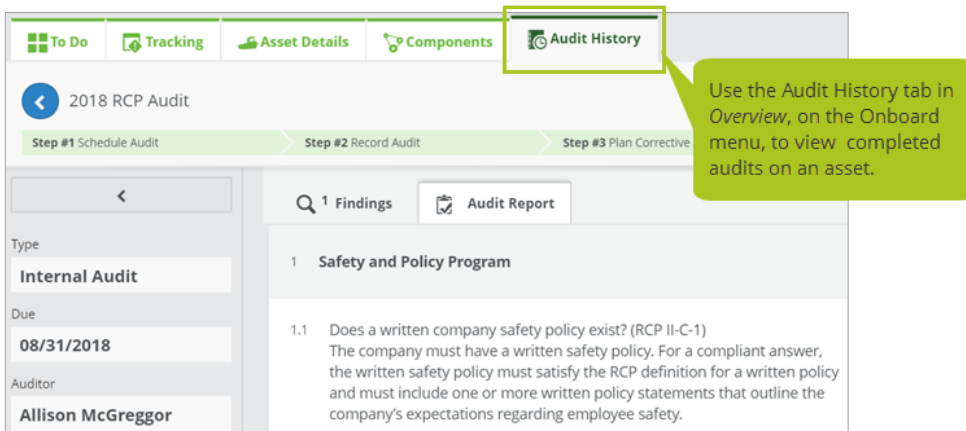
Filter forms by tags

To make it easier to find the forms you're looking for, we added new Tags filters to the following tabs:

- In *Forms*, on the Onboard menu, we added a Tags filter to the Library tab.
- In *Forms*, on the Compliance menu, we added Tags filters to the Library and Submitted tabs.

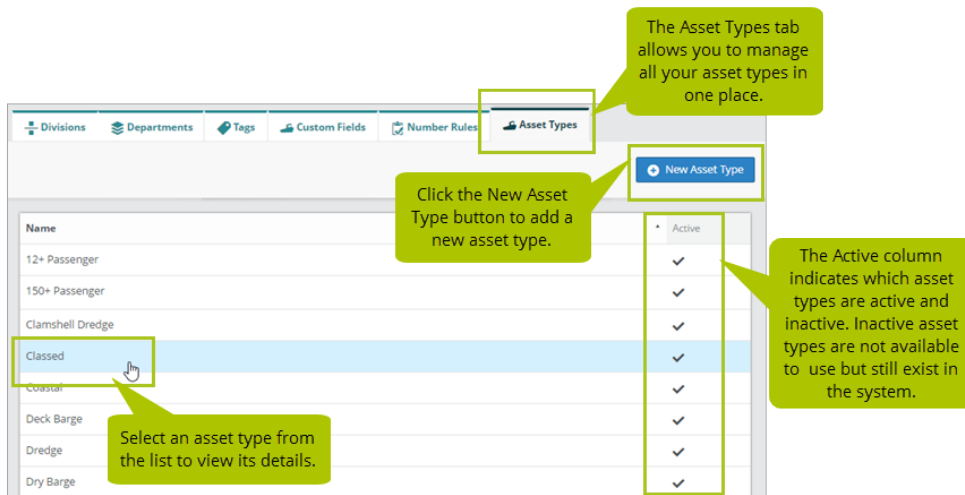
View completed audits from assets

We added a new Audit History tab to *Overview*, on the Onboard menu so your crew can view and print the completed audits for their assets.



New set up tab for asset types

In *Operations*, on the Setup menu, we added a new Asset Types tab to allow you to manage your asset types.



Open the original form or audit from a completed corrective action in history

When viewing a completed corrective action on the History tab, either from *Corrective Actions* on the Compliance menu or from *Logs* on the Onboard menu, you can now click in the Source field to open the original form or audit that created the corrective action.



Note If you don't have permission to view the original form or audit, you simply won't be able to click its name in the Source field.

Easily see the number of notes and attachments on audit findings

On the Audits tab, in *Audits*, on the Compliance menu, we added little number badges to the Notes and Attachments icons on the Findings sub tab so you can quickly see how many notes or attachments there are.

Clearer subject lines for task email notifications

We gave our email notifications for finished tasks more descriptive subject lines. We hope you like them!

Improvements to how we display deleted assets

When a deleted asset is displayed in history, it now appears with (deleted) after its name.

Helm CONNECT Jobs

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

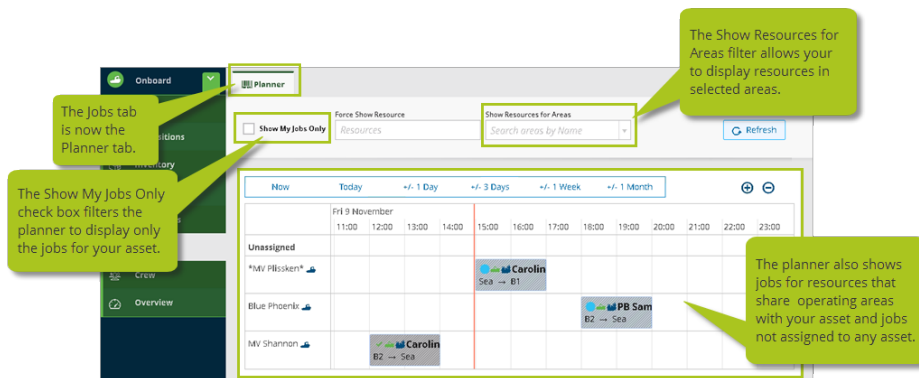
Introducing self-managed assets!

Helm CONNECT Jobs was designed with centralized asset dispatching in mind but, in many ports, assets manage their own dispatch and order tracking and/or handle dispatch for other assets. In this release, captains can now create, edit, and complete orders right on their assets, as well as send orders to other assets working in the same area. This powerful change lets users take advantage of Helm CONNECT Jobs in almost every situation. To see this feature in action, please contact your account manager.

Changes to the Jobs tab on the Onboard menu

In *Jobs*, on the Onboard menu, we made several changes to the Jobs tab in this release:

- We renamed the Jobs tab to the Planner tab.
- We added a new Show Resources for Areas filter that shows the following:
 - If you're working from an asset installation, the filter shows any areas that are: your asset's operating areas, children of your asset's operating areas, and parents of your asset's operating areas.
 - If you're working from shore, the filter shows any areas your user role gives you access to.
- We now show all jobs for any resource your asset shares an operating area with, as well as any jobs that aren't assigned to any asset. Previously, we only showed jobs from orders your asset was part of.
- We added a new Show My Jobs Only check box that allows you filter the displayed jobs so you only see the ones for your asset.



Can no longer change an order's division or area once it's saved

To support the data transfer requirements of our new self-managed assets feature, we can no longer allow you to change the area or division of an order once you've saved it.

Configure orders by division

You can now configure the fields on your orders by division. Previously, although you could configure the fields that appeared on your orders, this configuration would apply to all orders, regardless of the division. Now, you can configure a unique set of order fields for each division.

To set up a new configuration, do the following:

1. From the **Setup** menu, select **Orders** then click the **Order Configuration** tab.
2. Click **Configure**.
3. From the list of divisions on the right of the tab, select the division this configuration is for. Remember, each division will inherit the configuration of its parent division, unless you specify a different configuration for it.
4. The list of fields at the top of the tab are default fields. For each field, you can decide where to show it and whether or not it should be required.
5. In the **Custom Fields** area below the default fields, you can add new custom fields for your orders or manage existing ones.
6. When you're finished, click **Save Changes**.



Note If you had already configured your order fields before Version 1.12, your existing settings will automatically be applied to your root division when you update to Version 1.12. Each child division will then inherit the settings from your root division unless you decide to change them.

Set up tax types for billing

In *Invoicing*, on the Setup menu, we added a new Tax Types tab to allow you to manage taxes in Helm CONNECT. For each tax type, you can choose whether to have an external system calculate the tax, or have Helm CONNECT perform the calculation, based on the rules you set up.

New name for Vessel Tracking tooltip

In *Assets*, on the Management menu, we changed the label of the Vessel Tracking tooltip to Asset Tracking.

Edit and Delete buttons on the Fuel Tables tab now display correctly

If you're working in Internet Explorer, you'll notice the Edit and Delete buttons on the Fuel Tables tab in *Tariffs*, on the Jobs menu, now display correctly.

Reports and custom fields

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

Streamlined reporting filters

To make reporting in Helm CONNECT faster, easier, and more stable, we made some important changes to our report filters. Previously, not all report data sources had date range filters. Now they do. Also, to ensure your report data loads quickly, we limited the date range to 366 days across all date filters. Of course, you can still report on all your data, this just means you can only select up to 366 days at a time in a particular report. As always, you can export your data to Excel, Power BI, or other tools for visualization and analysis.

New data sources to report on maintenance templates

For Helm CONNECT Maintenance subscribers, we added the following new data sources to allow you to report on the maintenance templates for your assets:

- Inspection Templates
- Inventory Templates
- Maintenance Templates

New data sources to report on compliance templates

For Helm CONNECT Compliance subscribers, we added the following new data sources to allow you to report on the compliance templates for your assets:

- Audit Templates
- Form Templates

New data source to report on people tracking templates

For subscribers who have the People Tracking module, we added a new Personnel Certification Templates data source to allow you to report on your personnel certification templates.

New data source to report on asset tracking templates

For subscribers who have the Asset Tracking module, we added a new Asset Certification Templates data source to allow you to report on your asset certification templates.

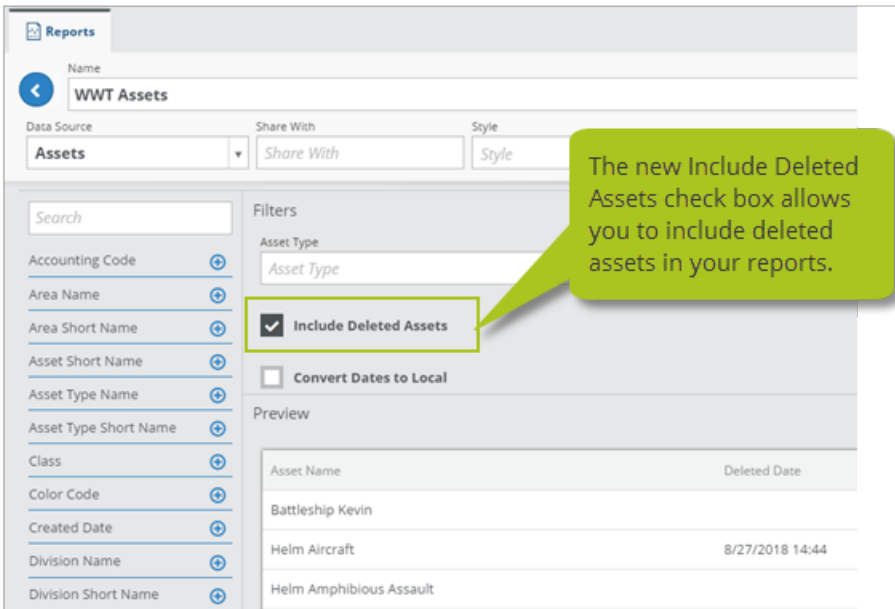
New Part Quantities data source

For Helm CONNECT Maintenance subscribers who have the Inventory module, we added a new Part Quantities data source that reports part details, including the asset name and quantity, for all parts currently tracked in the system. The data source only reports the most current inventory counts for each item.

Maintenance and compliance data sources have option to include deleted assets

For Helm CONNECT Maintenance and Compliance subscribers, we added a new Include Deleted Assets check box on the following data sources, that allows you to include deleted assets in your reports:

- Assets
- Audits
- Components
- Corrective Actions
- Documents
- Forms
- Inspection Checklists
- Inventory Checklists
- Maintenance Checklists
- Part Quantities
- Parts History
- Requisitions
- Tasks
- Vendor Part Prices



Changes to the Requisition Templates data source

For Helm CONNECT Maintenance subscribers, we made the following changes to the Requisition Templates data source:

- We added these new fields to the data source: Approval Date, Approved By, Associated Entity Asset Name, Associated Entity External Number, Associated Entity Name, Associated Entity Type, Require Approval, Line Items External Number, Line Items Is Labor, and Line Items Sort Number.
- We removed the Task field.

Billing Discrepancies data source now reports changes to transactions

For Helm CONNECT Jobs subscribers, we added four new field sets to the Billing Discrepancies data source to allow you to report who created, modified, approved, and submitted transactions:

- **Created By** reports who generated billing or made a manual transaction, as well as who reversed a transaction.
- **Modified By** reports who modified a draft transaction or a transaction in any way, including the transaction lines.

- **Approved By** reports who approved a draft transaction.
- **Submitted By** reports who submitted a transaction.