Release Notes

Version 1.14

Copyright and Publication Information

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Contents

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. We made the following platform changes in this release.

Date formats now match browser language settings

The dates in all our product lines now match the format used by the display language you set in your browser. For more about this feature, check out the "Date formats" article on our support website.

Start and end dates for new positions are blank by default

On the Details sub tab under Management > People > People, when you add a new position, the Start Date and End Date fields are now blank by default.

Helm CONNECT Maintenance and Helm CONNECT Compliance

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

URL hyperlinks in forms now active

You asked for this during Helm Labs! If you have Helm CONNECT Compliance, when you add a URL hyperlink to a text field in the main body of a form template and publish it, anyone who uses that form will be able to view and click the URL, which will then open in a new browser tab. This is convenient if you want to link to a different location within Helm CONNECT or to something else entirely, such as an internal or external web site. Users who are filling out a form can also add a URL hyperlink anywhere they can type text, and that URL will be clickable after the form is submitted, including when the completed form moves to history. Currently, the clickable URL hyperlink feature is available only for forms.

Note Although you can add URLs to Notes on a form, they won't be clickable. Also, if the URL links to a location in Helm CONNECT that you don't have permission to access, you will see a message that you don't have permission to that feature.

See all activity for an asset at a glance

If you also subscribe to the Event Logs module, you can now easily see the activities your assets are engaged in from Maintenance > Overview. You can also filter your assets by activity type.
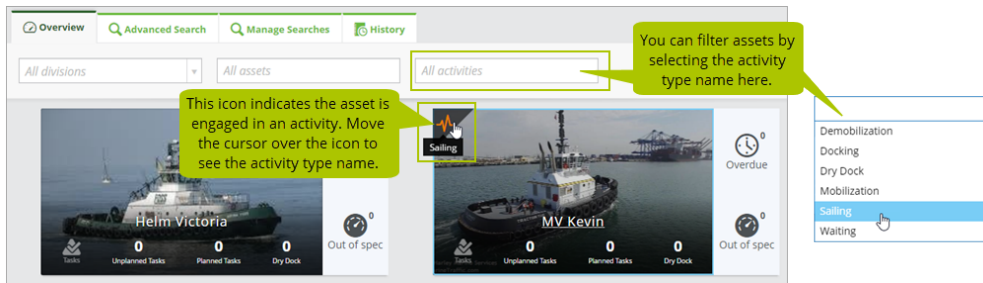
Individuals can acknowledge documents

You asked for this during Helm Labs! Previously, only a local installation using shared sign on could acknowledge receipt of a published document, and your shore team couldn't see which individuals had viewed the document. In Version 1.14, if you have Helm CONNECT Compliance, you can now choose whether a published document must be acknowledged by an asset or by an individual. The individual acknowledgment feature is available for Helm CONNECT on shore and for assets with local installations configured to use multi-user sign on or are using an internet connection to access Helm CONNECT on shore. Assets with local installations configured to use shared sign on can still acknowledge documents at the asset level only. For more about this feature, check out the "Individual acknow-ledgement of documents" article on our support website.

Link documents

You can now link documents that are in Helm CONNECT to a task, corrective action, check-list template or form template. You can also view any documents that are linked to a task, corrective action, checklist, or form. This is very useful if you have a procedure manual that you want to link to a maintenance checklist to make it easy for your crew to access, for example. For more about this feature, check out the "Link documents" article on our sup-port website.

Save searches on the Advanced Search tab

You can now save and share a search filter configuration right from the Advanced Search tab without having to create it on the Manage Searches tab first. This lets you adjust the fil-ters to get the results you want then save them.
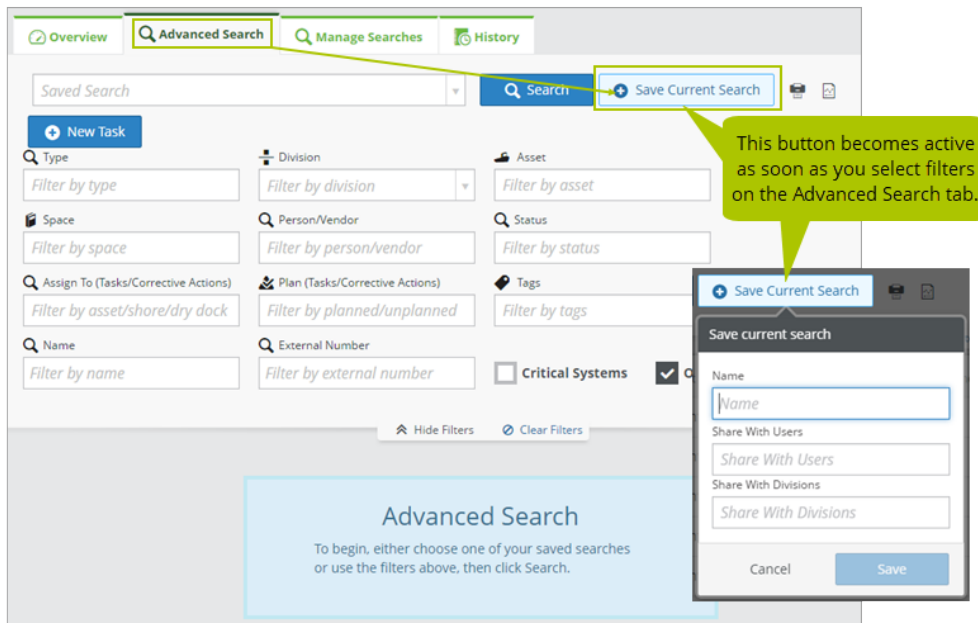
Print limits in Advanced Search

To improve performance, we now limit printing from the Advanced Search tab to 1000 items. If you try to print more than 1000 items you'll see a warning suggesting you modify your filters to reduce the number of search results.
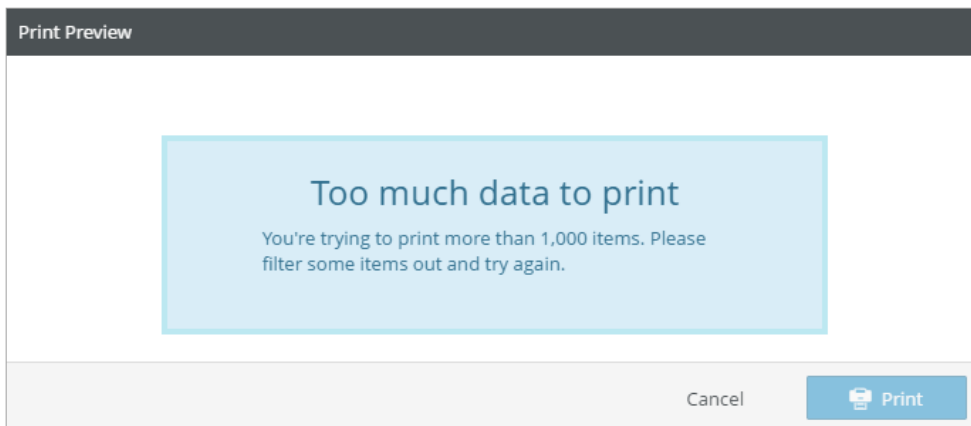
Updates to external numbers

To prevent duplicate external number values, we no longer attempt to synchronize the external numbers between shore and your assets. Instead, each asset now has its own, separate numbering sequence that branches off from the previously shared Last Number value. Any number rules you created in previous versions will still exist in 1.14 and the number sequence will continue without being reset to 1. However, if you implement a new local installation on an asset in 1.14, the external number counter will start at 1 for that asset.

Here are a few important things to keep in mind:

- We recommend you don't alter any existing number rules, especially the Last Number value.

- We recommend you always use a prefix or suffix when creating new a new number rule so you can distinguish it easily from other number rules.

- If you manually change the Last Number value for an existing number rule in Setup > Operations > Number Rules, that value will be published to all assets, which could result in duplicate external numbers on the assets.

- If you delete a number rule then create a new one for the same item type with the same prefix and suffix but with a lower Last Number value, this could cause duplicate external numbers when you publish the rule to your assets.

- The changes in this release won't affect existing external numbers; if any duplicate external number values were generated in previous versions, they will remain for existing items.

Helm CONNECT Jobs

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

Set contracts at the trip level

You can now set your contracts at the trip level, giving you the flexibility to bill individual trips in the same order to different customers. For example, you could bill an agent for the inbound and outbound trips on an order but bill any shifts in between to the ship owner. Previously, you had to track those shifts as separate orders, creating extra work for your billing clerks and resulting in additional vessel calls in your reports.

To use this feature, you must add the new Use Different Contract permission to your role on the Roles tab under Setup > Users.
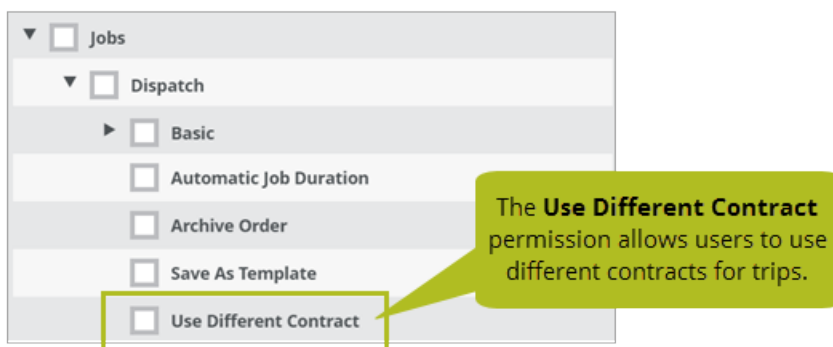
Correct end times for jobs with same start times for mobilization and activity

When a mobilization start time and activity start time are the same, the end time of the job now populates correctly with the end time of the last primary activity.

Change Log loads more information

The Load More button in the Change Log now correctly loads more information when you click it.

Date/Time fields in the Notes overlay working correctly

In the Notes overlay, the Date/Time fields now correctly default to the system time.

Helm CONNECT Personnel

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

Pay back withdrawals with the sum of your rerates

You now have the option to repay your withdrawals with the sum of your rerates. For example, if the original withdrawal was two days at $100 ($200 total) and the accrued amount is four days at $75, the system will repay half a day (0.5) at $50 and apply $25 to a rerate record for your first two accrued days. It will then sum your first two rerates and pay back a third half-day (0.5) quantity. On your third accrued day, the system will repay half a day (0.5) at $50, topping you up to pay back your full two days at $100. The system will then apply $25 to a rerate record and distribute your remaining fourth accrued day as needed.

Display earning codes for days off

You can now make specific earning codes available for days off. When you're adding a new earning code or editing an existing one on the Setup > Payroll > Earning Codes tab, select **Days Booked Off** from the **Display In** field to add that code to the Earning Codes list on the Schedule sub tab under Management > People > People.

When adding or editing an earning code, select **Days Booked Off** to display it on the Schedule sub tab under Management > People > People.
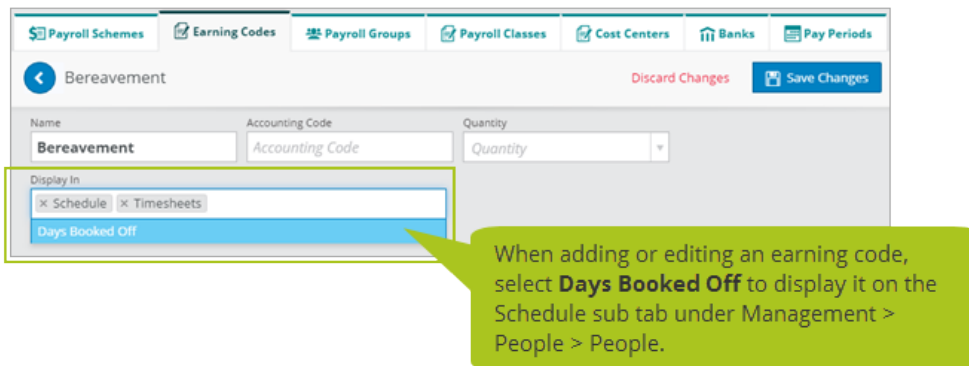
Improvements for managing days off

Under Management > People > People, on the Schedule sub tab, we made the following improvements in the Book Days Off section:

- **Apply earning codes to days off**: On the Enter Days Off Request card, we replaced the Paid check box with a new Earning Codes list that allows you to select an earning code for days off. For earning codes to appear in this list, you must first configure them to display in Days Booked Off on the Setup > Payroll > Earning Codes tab.

- **Add notes to requests**: On the Enter Days Off Request card, we added a Note field that allows you to add a note to a request. Notes added here can be viewed, edited, or deleted from the Days Off card.

- **See total number of days requested**: Below the Notes field, we now display the total number of days requested. Click the Edit Day Values button to edit the number of days.

- **New Days Off card**: We replaced the Future Days Booked Off and Past Days Booked off cards with a single card called Days Off with two new buttons, Upcoming Days Off and Past Days Off, so you can display the information you want.
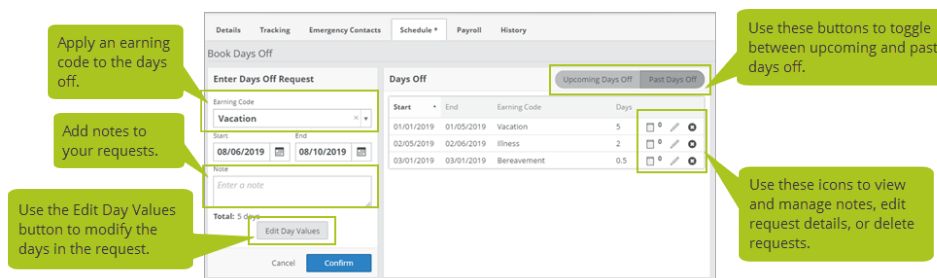
Enhanced schedule warnings

We improved the format of the warnings you see when you try to schedule someone during a time they have booked off and now include the associated earning code, if there is one. We also now display these warnings when you crew someone on from either the Onboard > Personnel > Timesheets tab or the Onboard > Personnel > Crew Changes tab.

Specify a quantity for bank accruals

Previously, the system always used the quantity of the payroll transaction line when configuring bank accruals. In Version 1.14, we added a new "Use pay line quantity" check box to bank accruals on the Setup > Payroll > Payroll Schemes tab. If you select the new check box, the system will use the quantity from the payroll transaction line, however, if you clear the check box you can now enter an override quantity or formula.

New payroll targets for rates, extra pay, and bank accruals

On the Setup > Payroll > Payroll Schemes tab, we added two new payroll targets for rates, extra pay, and bank accruals:

- **Date**: Allows you to configure payroll schemes that automatically generate rates, extra pay, or bank accruals that occur based on specific dates.
- **Pay Period**: Allows you to configure payroll schemes that automatically generate rates, extra pay, or bank accruals that occur per pay period.

Note For rates and extra pay, you'll now see a separate button for the Work Period target. Although rates and extra pay had Work Period targets in Version 1.13, there was no separate Work Period button. Bank accruals did have Work Period buttons in Version 1.13.
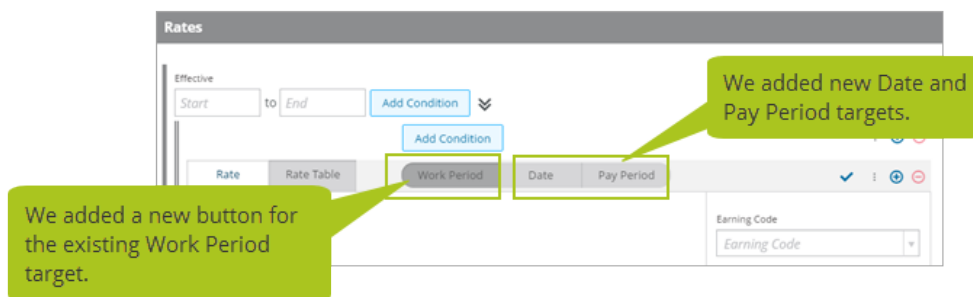
Open to the most recently used sub tab on Crew Changes sidebar

The sidebar on the Personnel > Schedule > Crew Changes tab has two sub tabs: Details and Current Crew. The system now remembers which sub tab you used most recently and displays it the next time you go to the Crew Changes tab.

Save changes to crew change notifications without entering an email address

If you add a new person in Management > People > People, the selection in the Crew Change Notifications list will still default to "Email." This is for consistency with earlier ver-

sions of Helm CONNECT. However, you will now be able to save their profile even if there is no email address in the Email field.

> **Note** If you select **None** from the **Crew Change Notifications** list, you will no longer be able to select **Email** or **Email + Text** until you enter an email address in the Email field. Similarly, you can't select **Email + Text** or **Text** until you enter a phone number in the Cell Phone Number field.

All "Include Future Positions" check boxes now labeled "Hide Future Positions"

In Version 1.13, we introduced new check boxes that allowed you to see certifications for any future positions, both on shore as well as on your assets. However, depending on where you viewed the certifications, some of the check boxes were labeled "Include Future Positions" and others were labeled "Hide Future Positions". For consistency, we changed the labels on all these check boxes to "Hide Future Positions" and changed their default behavior to be clear (not selected) by default. Here's an overview of these check boxes:

- **Reports > Crew Certifications**: The check box is now labeled "Hide Future Positions" and behaves as follows:
    - The Hide Future Positions check box is clear (not selected) by default on all new reports. All certifications are now included in the report unless you choose to hide them by selecting the Hide Future Positions check box.
    - Any saved reports remember your most recent selection.

- **Management > People > People > Tracking**: The check box is now labeled "Hide Future Positions" and behaves as follows:
    - The Hide Future Positions check box is clear (not selected) by default.
    - The system remembers your most recent selection.

- **Management > People > Tracking**: The check box is still labeled "Hide Future Positions" and still behaves as follows:
    - The Hide Future Positions check box is clear (not selected) by default.
    - The system remembers your most recent selection.

Reports and custom fields

We made a number of changes to our reports in this release. If you use report data in reporting tools outside of Helm CONNECT, there are some changes that might affect you. If you have any questions about reports and their data sources, please contact your account manager.

Tasks and Corrective Actions

In Version 1.13, we introduced the new Tasks (Beta) and Corrective Actions (Beta) data sources. Now in Version 1.14, we removed the old versions of these data sources and replaced them with the new ones. We also removed the (Beta) from the name. If you have existing Tasks or Corrective Action reports that used the old version of the data source, don't worry, we migrated the reports to the new data sources so you won't lose any data. For more about this feature, check out the "Updates to the tasks and corrective actions reports" article on our support website.

Documents

We made a couple of small changes to the Documents report:
- We added a new field: Requires Acknowledgment by Individual
- We renamed two fields:
    ◦ Acknowledged was renamed to Asset Acknowledged
    ◦ Acknowledged Date was renamed to Asset Acknowledged Date

For more about this feature, check out the "Updates to the documents report" article on our support website.

Maintenance Checklists, Inventory Checklists, Inspection Check-lists, and Forms

We made several updates to these reports:

- You can now filter the Forms report by different date types.

- You can now filter Maintenance Checklists and Inventory Checklists reports by Asset, Asset Type, Division, and Status.

- These reports generate more quickly now because they take advantage of our database improvements.

- These reports are now filtered by the division in your user profile, so you see only the data in the report that you have permission to see.

- We added key data fields to the data sources for all these reports and removed fields that weren't useful. We also streamlined the field pickers so they don't have so many nested levels.

- If you created any of these reports in previous versions of Helm CONNECT, they will still be available and will now use the updated data source.

For more about this feature, check out the "Updates to the forms and checklist reports" article on our support website.

Bank Totals

We removed the Bank Total column and replaced it with three new columns:

- **Accruals Total**: Displays the total dollar amount each person has accrued in their bank for the selected pay period.

- **Withdrawals Total**: Displays the total dollar amount each person has withdrawn from their bank for the selected pay period.

- **Net Total**: Displays the difference between each person's total accrued amount and total withdrawn amount for the selected pay period (Accruals Total - Withdrawal Total = Net Total).

Bank Records, Bank Totals, Crew Changes, Payroll Transactions, People, Work Periods

We made several updates to these reports:

- We added a new Payroll Groups filter to the headers that allows you to filter the displayed data by one or more selected payroll group. If you don't select any payroll groups, the displayed data will include data for people in all your payroll groups as well as people who don't have an assigned payroll group.

- We added a new group to the column selector called Payroll Group that contains the following fields:
    - Accounting Code
    - Archived
    - Created
    - Modified
    - Name