



Release Notes

Version 1.17

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. We made the following platform changes in this release.

More improvements to people selection fields

In Version 1.16, we made improvements to the people selection fields in several areas of Helm CONNECT. In Version 1.17, we continued to apply this improvement to the people selection fields in the following locations:

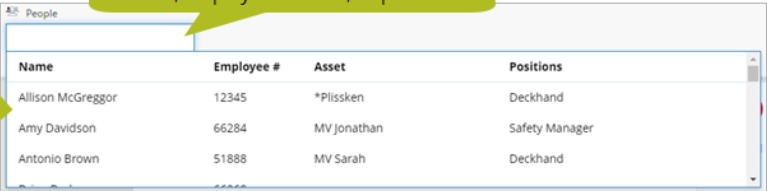
- People select fields in:
 - Onboard > Personnel > Crew tab
 - Onboard > Forms > History tab
 - Compliance > Forms > History tab
 - Management > People > People tab
 - Form header fields
 - Form response fields
- Responsible Parties fields in:
 - Onboard > Requisitions (when creating or editing requisitions)
 - Maintenance > Requisitions > Requisitions (when creating or editing requisitions)
 - Compliance > Audits (when you create a new audit)
 - Compliance > Documents > Document Control (when you edit a document)
 - Management > Assets > Assets > Details sub tab
 - Management > Assets > Assets tab; select an asset, then click the Tracking sub tab then click Manage Certifications
 - Management > People > People tab; select a person, then click the Tracking sub tab then click Manage Certifications
 - Setup > Templates > Inventory/Forms/Asset Certifications/Requisition tabs (when you create or edit a template)

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The people selection fields listed above now load only the first 50 names in the system, sorted alphabetically by first name. If the name you need isn't there, or to find the name you want more quickly, you can search by typing a first name, last name, employee number, or position in the field. In Version 1.18, we'll continue rolling this improvement out to more people selection fields throughout Helm CONNECT.

People selection fields load the first 50 names in the system, sorted alphabetically by first name.

If the name you need isn't in the initial list, or to find a name more quickly, you can search here by typing a first name, last name, employee number, or position.



Name	Employee #	Asset	Positions
Allison McGregor	12345	*Plissken	Deckhand
Amy Davidson	66284	MV Jonathan	Safety Manager
Antonio Brown	51888	MV Sarah	Deckhand

Helm CONNECT Maintenance and Helm CONNECT Compliance

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

Maintenance by Metric is here!

We're so excited to introduce Maintenance by Metric!

To expand the capabilities of Helm CONNECT Maintenance and meet evolving customer needs, we're introducing some powerful new features in Version 1.17. You can now set up and track up to three cumulative reading types for your asset components, not just running hours, and use them to schedule maintenance checklists and help the system more accurately predict when maintenance will be due. We also improved visibility in both the Onboard and Maintenance menus about when maintenance checklists are due, and provided more information about cumulative reading values, frequency, and due values in completed checklists in history. For customers who use Reporting, we updated the Components, Maintenance Templates, and Maintenance Checklists reports to accommodate the additional cumulative reading types.

For more about this new feature, check out our [blog post](#) and this [article](#).

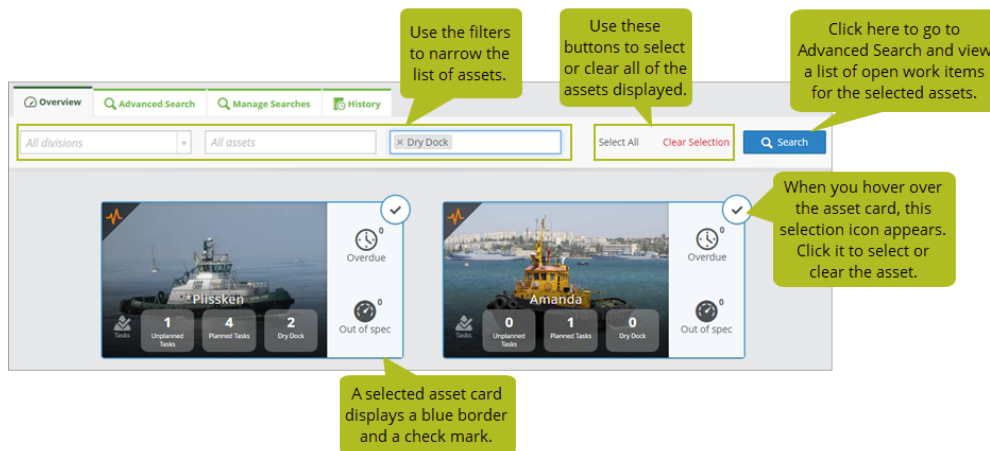
Advanced Search now displays overdue items in red

To maintain consistency with how we display overdue items in Onboard > Logs and Onboard > Overview, search results on the Maintenance > Overview > Advanced Search tab now display Est Due In and Due Date values for overdue items in red.

Select multiple assets on the Maintenance > Overview tab

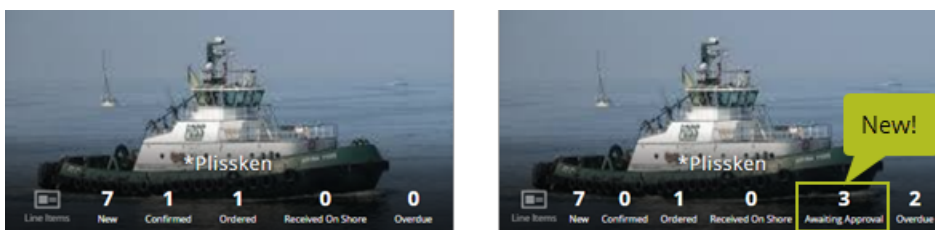
You can now select multiple assets on the Maintenance > Overview tab, then click Search to go to the Advanced Search tab where Helm CONNECT displays all open work items for the selected assets. Combine this feature with the divisions filter on the Overview tab to find the assets you want to search more quickly. Helm CONNECT Maintenance customers who

also subscribe to Helm CONNECT Jobs or the Event Logs module, and have activities defined in the system, can filter to find assets engaged in a specific activity.



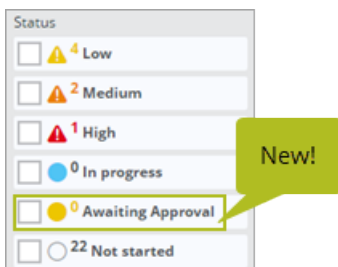
Asset requisition cards now display the number of items awaiting approval

The asset requisition cards on the Maintenance > Requisitions > Dashboard tab now display the number of items that are awaiting approval so you have a more complete picture of your requisitions.



Find inspections awaiting approval more easily

We added an Awaiting Approval filter to the Onboard > Overview tab to help you find inspections that are awaiting approval.

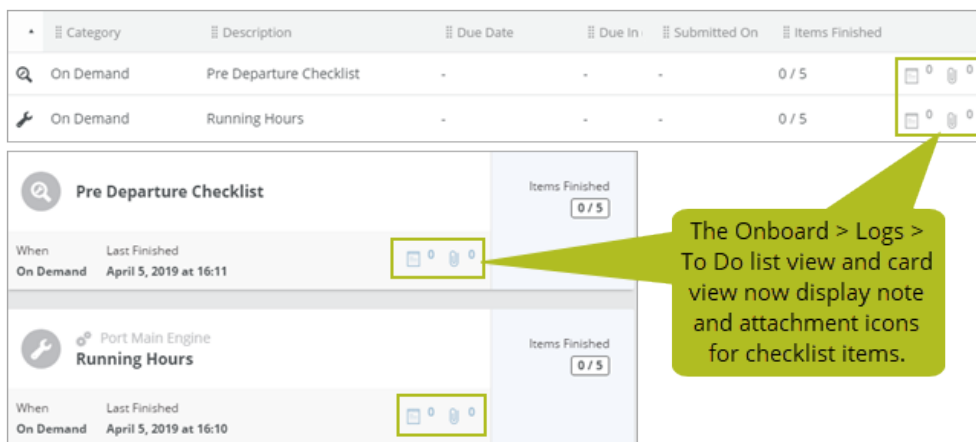


Improvements to notes in checklists

Notes in inspection, maintenance, and inventory checklists now work the same as notes in tasks, forms, and other items. This means that more than one person can record more than one note for an item, edits are tracked, and the date and time are recorded and displayed right in the Notes window as well as in history. The Notes icon in the checklist header also now displays the number of notes that were added to that checklist.

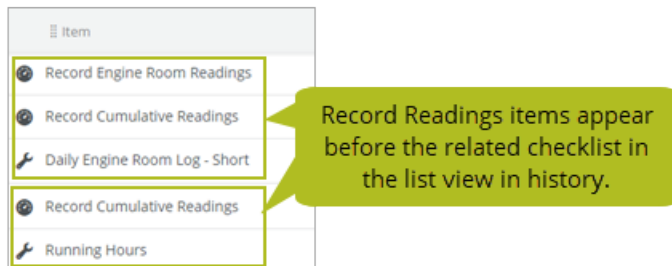
Onboard > Logs > To Do list now displays note and attachment icons for checklists

Previously, checklist items in the Onboard > Logs > To Do list didn't indicate whether or not there were any notes or attachments. In Version 1.17, note and attachment icons appear for checklists in both the list view and the card view.



Consistent order for maintenance checklist items in history

Previously, in history, the order in which maintenance checklists used to capture readings and the Record Readings items generated by the completed checklists appeared could vary. In Version 1.17, the Record Reading items will always appear first and the related checklist will appear second. This change affects only how items are displayed in history, nothing else.



The Complete Audit button is enabled only when all changes are saved

Previously, when you were recording an audit on the Compliance > Audits > Audits tab, if you clicked the Complete Audit button before all of your responses were saved by the system, this could result in missing information. In Version 1.17, to prevent this from happening, we now enable the Complete Audit button only after all of your changes are saved.

Side tabs display the number of items

The right side tabs that appear in the detail view in the following locations in Helm CONNECT now display the number of assets, notes, or attachments:

- Compliance > Audits
- Onboard > Overview > Audit History
- Setup > Templates > Inspections
- Setup > Templates > Maintenance
- Management > Assets
- Management > People



Consistent locations for new windows

For consistency, when you click a button or a field in Helm CONNECT that opens a new window, it'll now appear in the upper-middle area of your browser window. Confirmation messages, however, still appear close to the buttons they're related to.

Print and Export icons disabled while a search runs in Advanced Search

Previously, while running a search on the Maintenance > Overview > Advanced Search tab, you could click the Print or Export icons before the search was complete, which meant the results in the generated PDF or Excel file might not contain your complete search results. In Version 1.17, to prevent you from clicking them too early, we only enable the Print and Export icons when the search is finished and if there are search results displayed.

Improvements to the Person/Vendor filter

We made the sort order in the Person/Vendor list on the Advanced Search and Manage Searches tabs consistent with other people selection lists in Helm CONNECT. This means that all active people appear first, listed in alphabetical order, then inactive people, then deleted people. The same sort order applies to vendors. We also added the (Inactive) label to inactive vendors.

Minor change to maintenance templates

In maintenance templates, for accuracy, the Readings item label has been changed to Reading. This doesn't affect any of your existing templates, checklists, or related reports.

Form templates assigned to deleted assets remain visible

We addressed a scenario where a form template could "disappear" if it was first published to multiple assets, then one (or more) of those assets was deleted from the system, and then, the remaining assets were removed from the form template with the intention of publishing it to all assets. Now, in that scenario, the form template remains visible and you can publish it to all assets.

Date fields in checklists and forms no longer affected by time zones

Previously, if you selected a date in a list item when completing a checklist or form, users in different time zones who viewed the completed checklist or form might see a different date than the one you entered. In Version 1.17, for consistency, the date you pick in checklist and form list items is the date that appears when the item is viewed in history.

The Components sub tab alerts you if you forget to define a component

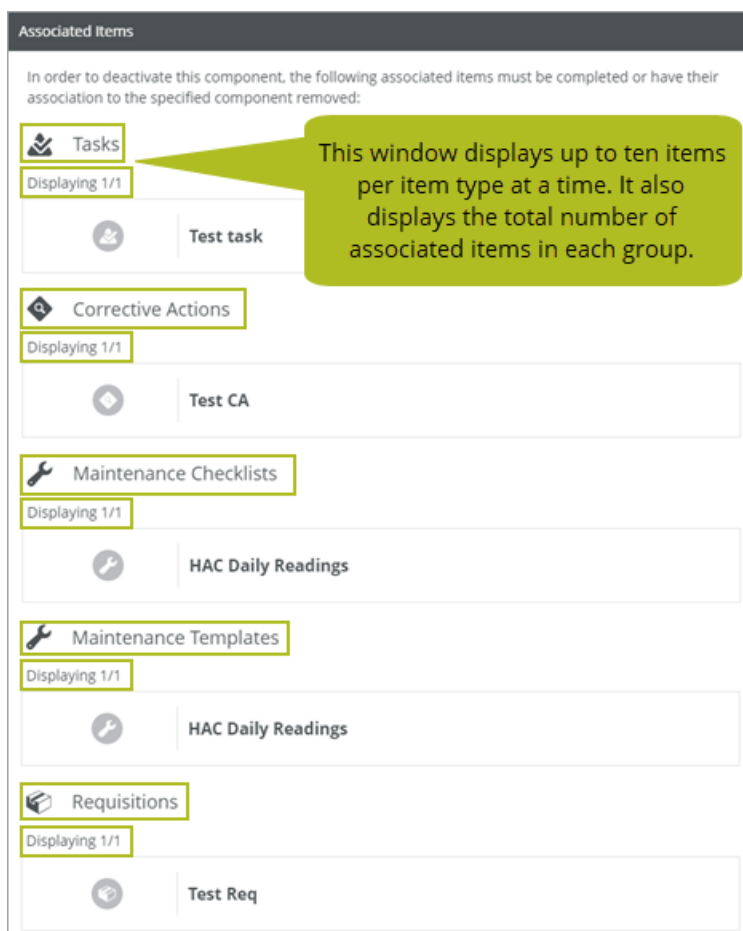
On the Management > Assets > Assets tab, if you add a component to an asset without entering a component description and selecting the component type, the Components sub tab will now turn red and shake when you try to save to let you know there are items on that tab that you still need to define.

Task button numbers on asset cards and search results now match

In Version 1.15, we introduced clickable buttons on the Maintenance > Overview > Overview tab that display the tasks for the selected asset on the Advanced Search tab with one easy click. If the asset had any corrective actions assigned to it, however, these were included in the number on the task button unnecessarily, and the number on the button didn't match the number of tasks displayed. In Version 1.17, the numbers on the task buttons now match the number of tasks you see in the search results.

Faster notifications when deactivating components

To improve system performance, if you try to deactivate a component linked to active work items, the Associated Items window now displays a maximum of ten of each type of work item at a time instead of all of them at once, grouped by item type, for a total of up to 50 items displayed. You'll also see a count of the total number of active work items, per item type, linked to the component. As you address the associated items, the system will continue to display any outstanding items, ten at a time per item type, until you've addressed all of the items. Once you've addressed all outstanding associated items, you'll be able to deactivate the component.

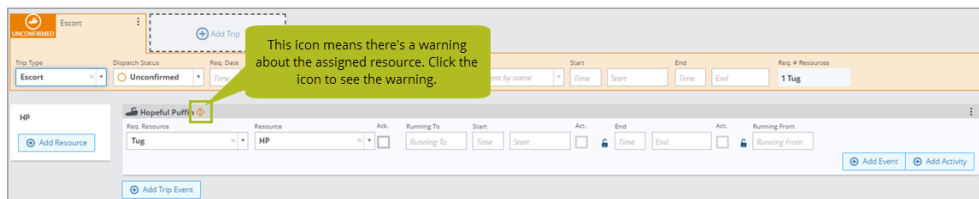


Helm CONNECT Jobs

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

Warning if resource type doesn't match requested resource

On the Jobs > Dispatch > Trips tab, when you assign a resource to a trip, you'll now see a warning if the assigned resource doesn't have a resource type, or if its resource type doesn't match the requested resource.



New Trip Duration column on the Ships tab

In the detail view on the Setup > Ships > Ships tab, we added a new Trip Duration column that shows the duration of each completed trip, based on the trip's start and end times.

The screenshot shows the 'Ships' tab in the Helm CONNECT interface. A callout box points to the 'Trip Duration' column, stating: 'This column shows the duration of completed trips, based on the trip's start and end times.' The table below shows the data for the 'Star Pass' ship.

Dispatch Status	Agent	Customer	Req. Time	From	To	Area	Division	Awarded	Trip Duration	Call Sign
Complete	Worldwide Ship...	ABC Lines	-	SEA	Seattle Pier B6	Pacific North W...	Pacific Coast M...	-	3h 0m	Call Sign
Complete	ABC Lines	ABC Lines	-	Seattle BP Harb...	Seattle Stream	Pacific North W...	Pacific Coast M...	Jonathan, Emma	2h 45m	Call Sign
Complete	ABC Lines	ABC Lines	-	Seattle Stream	Seattle BP Harb...	Pacific North W...	Pacific Coast M...	Jonathan, Emma	3h 10m	Call Sign

New External System Code field for customer billing addresses

On the Setup > Sales > Companies tab, we added a new External System Code field for the customer billing address on accounts. The new field is alphanumeric and supports 200 characters.

The screenshot shows the 'Accounts' tab in the software. The form includes fields for Name, Short Name, External System Code, and Accounting Terms. A yellow callout box points to the 'External System Code' field, stating 'This field is new in Version 1.17.' The form also includes checkboxes for 'My Company', 'Active', 'AP', 'Blocked', and 'Active'. There is a 'New Custom Field' button at the bottom right.

New Latitude and Longitude fields on the Locations tab

In the detail view on the Setup > Locations > Locations tab, we added two new fields: Latitude and Longitude. The new fields support only valid latitude or longitude values.

The screenshot shows the 'Locations' tab in the software. The form includes fields for Name, Short Name, External System Code, Location Type, and Running Time. A yellow callout box points to the 'Latitude' and 'Longitude' fields, stating 'These fields are new in Version 1.17.' The form also includes a 'Divisions' dropdown menu and a 'New Custom Field' button at the bottom right.

Helm CONNECT Personnel

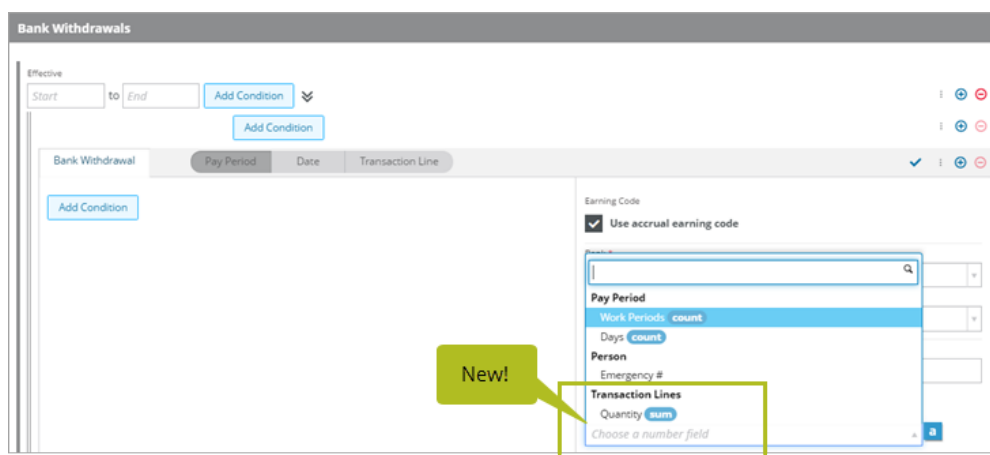
We made the following changes to Helm CONNECT Personnel in this release.

Override earning codes while planning or approving crew changes

You can now add override earning codes while planning crew changes, instead of having to wait until the crew is onboard. Also, if your crew add an override earning code when they submit a single crew change or a timesheet from Onboard, you can now see the new code while reviewing pending work on the Personnel > Scheduling > Crew Changes > Pending sub tab, instead of having to approve the work first then switch to the Schedule tab to see it.

Automatically use bank withdrawals to top up payroll

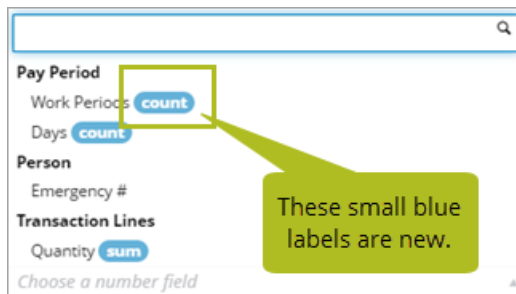
Previously, if you wanted to use bank withdrawals to top up payroll, you had to add bank withdrawals by manually adjusting each crew member's pay. Now, you can configure your payroll schemes to use bank withdrawals automatically to top up payroll. On the Setup > Payroll > Payroll Schemes tab, when you use the Pay Period target on bank withdrawals, you'll see a new Transaction Lines category and a new Quantity formula in the Amount Formula Value list. This new formula allows you to sum up the quantity of all payroll transactions per pay period.



For help configuring your payroll schemes to take advantage of this new feature, please contact your account manager.

Labels on conditions and formulas in payroll schemes


For consistency with Helm CONNECT Jobs, we're adding little blue labels to the right of some items on the Setup > Payroll > Payroll Schemes tab. You'll see one of these labels on a condition or formula if it's not easy to tell what the item does. In this release, we added them to the existing Days and Work Periods fields underneath Pay Period conditions in rates, extra pay, bank accruals, and bank withdrawals. We also added them to the new Transaction Line Quantity field for bank withdrawals.



See the status of your payroll queue

On the Personnel > Payroll > Details tab, we added messages to individual payroll transactions to help you manage your payroll queues more easily. One message will let you know if the item is in the queue for payroll generation and the other will let you know if payroll failed to generate for that item.

303423 - Beverly (5/5) Crusher

 In queue for payroll generation

Pay

July

Code	Mon 1	Tue 2			
6688 2233 12345	100.00	100.00	100.00	100.00	100.00

This message lets you know the item is in the payroll queue.

Total Work: 10.0 Total Pay: 1400.00

Banks

Leave Net Period Total

600 / 6

Overtime Net Period Total

0 / 0

This message lets you know the item is in the payroll queue.

New order for Operations permissions

On the Setup > Users > Roles tab, the order of the permissions in the Setup > Operations group now matches the order of the tabs in Setup > Operations.

▼ <input type="checkbox"/> Operations
<input type="checkbox"/> Divisions
<input type="checkbox"/> Departments
<input type="checkbox"/> Holidays
<input type="checkbox"/> Template Categories
<input type="checkbox"/> Reading Types
<input type="checkbox"/> Tracking Systems
<input type="checkbox"/> Tags
<input type="checkbox"/> Number Rules
<input type="checkbox"/> Asset Types

These permissions are now in the same order as the tabs in Setup > Operations.

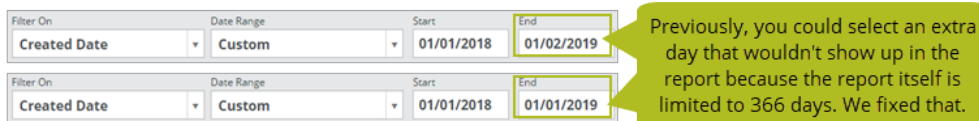
Reports and custom fields

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

Date filter improvements

Custom date range

Previously, if you used the Custom date range filter to generate a report for an entire year, it was possible to select an extra day that wouldn't appear in the report because the report itself is limited to 366 days. In Version 1.17, we fixed that. The start and end date filters will now let you select only up to 366 days.



The image shows two side-by-side filter interface elements. Each has a 'Filter On' dropdown set to 'Created Date' and a 'Date Range' dropdown set to 'Custom'. The top element shows a 'Start' date of '01/01/2018' and an 'End' date of '01/02/2019'. The bottom element shows a 'Start' date of '01/01/2018' and an 'End' date of '01/01/2019'. A green callout bubble points to the 'End' date field in the top element, containing the text: 'Previously, you could select an extra day that wouldn't show up in the report because the report itself is limited to 366 days. We fixed that.'

Dynamic date ranges

Previously, when you created a report using one of the dynamic date range options, such as Month to date, the system remembered the date range that was in the filter fields when you saved the report. When you opened the report again, those original dates were displayed in the date selection fields, but the report preview displayed results based on the current date. Now, for consistency, when you open an existing report that uses a dynamic date range option, the dates displayed in the selection fields are based on the current date and they match the date range of the data displayed in the report preview.

Changes to reports to accommodate cumulative reading types

Our new Maintenance by Metric feature required some supporting changes to the Components, Maintenance Templates, and Maintenance Checklists reports to accommodate the addition of more cumulative reading types. 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.

Here's an overview of what we did:

- In the Components report, you'll see a column for each active cumulative reading type you've defined in the system for your components.
- In the Maintenance Templates report, you can filter the report by any or all of your cumulative reading types, and the Frequency column displays the schedule for all of your cumulative reading types.
- In the Maintenance Checklists report, you'll see frequency, due values, and reading values on completion for all of your cumulative reading types, and the Overdue column checks both calendar and cumulative reading schedules to determine if a checklist was overdue compared with the date parameters of the report.

For more information, check out this [article](#).

Helm CONNECT API

We made the following changes to the Helm CONNECT API in this release. For more details, please refer to our [API documentation](#).

New endpoints

We added the following endpoint:

- Emergency Contacts

New fields for existing endpoints

We added new fields to the following endpoints:

- Transaction - Details
- Transaction - Set Posted
- Company - Create/Update Account Address

New optional filters for existing endpoints

We added new optional filters to the following endpoints:

- Find Users
- Find Trips