



Release Notes

Version 1.18

Copyright and Publication Information

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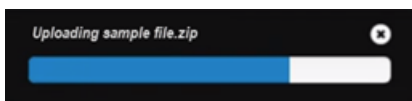
The platform

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.

Progress bar for file uploads

In this release, we added progress bars so that you can see what's happening when you manually upload files in Helm CONNECT.

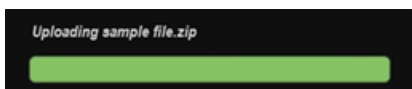
File upload in progress:



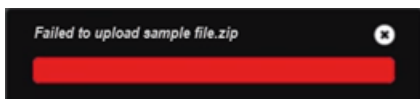
Note

Clicking the X in the upper right corner doesn't stop the upload, it just closes the progress bar window.

File upload successful:



File upload failed:



More improvements to people selection fields

In Version 1.16, we made some improvements to the people selection fields for notes, tasks, and corrective actions. In Version 1.17, we applied those improvements to even more people selection fields throughout Helm CONNECT. Now, in Version 1.18, we've continued to apply this improvement to the people selection fields in the following locations:

- Checklists (all people selection lists)
- The Created By list in Compliance > Documents > Document Control when you create a new document
- The Transferred By and Recorded By lists in Onboard > Inventory and Inventory > Inventory
- All people selection lists (view and edit) in the Requisitions module, both on board and on shore
- The Logged By list in Onboard > Logs when you log a new event or activity
- The Created By list in Linked Document windows everywhere Custom fields of the Select Box and Multi Select Box type with the People data source
- People selection filters in reports (Person, Crew, Filled By, etc.)
- Logged By lists when you edit a job item

Just in case you don't remember what these improvements mean, to improve performance, the people selection fields 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 just by typing a first name, last name, employee number, or position in the selection field.

Faster set up time for local installations

We've reduced the time it takes to install Helm CONNECT as a local installation on an asset.

New number custom fields now appear immediately

We addressed an issue throughout Helm CONNECT where, if you added a new custom field for numbers, the new field wouldn't appear until you refreshed the page. Now the field appears as soon as you create it.

Helm CONNECT Maintenance and Helm CONNECT Compliance

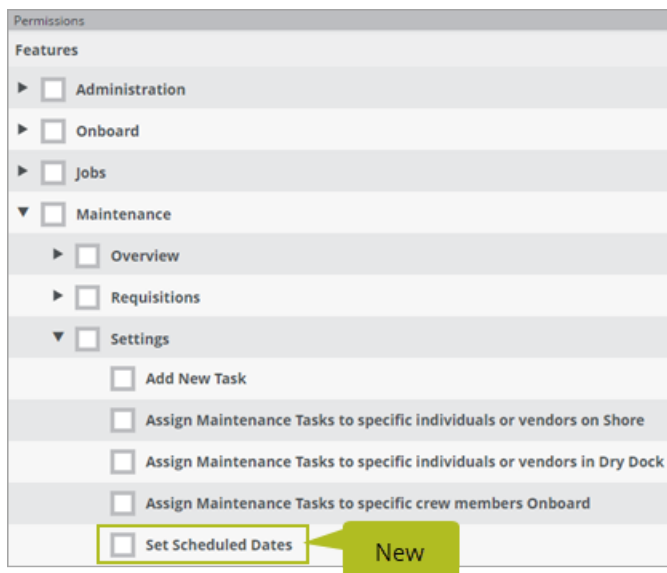
We made the following changes to Helm CONNECT Maintenance and Helm CONNECT Compliance in this release.

Scheduled date for checklists and tasks

On the Onboard > Logs, Onboard > Overview tab and the Maintenance > Overview > Advanced Search tab, you can now add a scheduled date for maintenance routines, inspections, inventory counts, and tasks. You can also sort and organize work by the scheduled date.

New Set Scheduled Dates permission

In Setup > Users > Roles, we added a new role permission under Maintenance > Settings so you can manage who can set scheduled dates. If your user role doesn't have this permission, you'll be able to see the scheduled date, but you won't be able to change it.





Note

If you subscribe to Helm CONNECT Maintenance, this feature will be available automatically when you update to Version 1.18.

Request more cumulative reading types

If you have permission to the Setup > Operations > Reading Types tab, you can request additional cumulative reading types from a convenient new menu item: Setup > Limits.

New tooltip on the Setup > Templates > Maintenance tab

In Version 1.17, with Maintenance by Metric, we introduced the ability to schedule maintenance templates by calendar date, cumulative reading type, or both. If a maintenance template uses multiple schedules, all of this information is displayed in the Frequency column on the Setup > Templates > Maintenance tab, and you might have to expand the column width to see all the information. In Version 1.18, we added a tooltip that displays all of the schedule frequencies so you don't have to adjust the column width to see the information.

Template	Asset	Component	Frequency	Effective Date	Space
Plissken Fuel Transfer Pump Maintenance	*Plissken	Fuel Transfer Pump (Pump)	Monthly or 500 hr Runni...	07/01/2019	Engine Log
Port Main Engine 1000hr Maintenance	*Plissken	Port Main Engine (Engine)	Monthly or 500 hr Running Hours or 6000 gal Fuel Used		Engine Log

When you hover over an item in the Frequency column, a tooltip displays all of the schedule frequencies for the template.

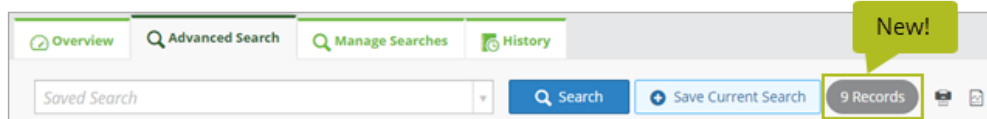
Cumulative readings appear in component history

Now, when you deactivate a component, any cumulative readings that existed at that time will appear in the component's history on both the Onboard > Inventory > Components History tab and the Inventory > Inventory > Components History tab. If you delete a cumulative reading type, however, it will be deleted throughout Helm CONNECT, including component history.

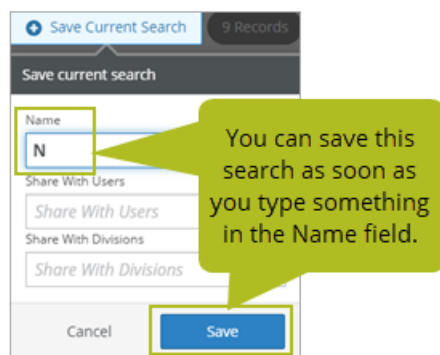
Improvements to Advanced Search

We made the following improvements on the Maintenance > Overview > Advanced Search tab:

- **Number of records:** The system now displays the number of records found when you run a search.



- **Save current search:** Previously, you had to click outside the Name field in the "Save current search" window before you could save a search on the Advanced Search tab. Now, the Save button is enabled as soon as you type something in the Name field.



Improvements to Night Mode

Previously, if you were using the Night Mode display, it was difficult to tell if you'd missed required fields when completing a checklist or task. In Version 1.18, if you miss a required field, the field text changes to a brighter, lighter red to make it more obvious. Also, as another improvement, when you complete a checklist item, both the text and check mark turns green, just like it does in Day Mode, so you can see which items you've completed more easily.

Tasks and Corrective Actions now due at end of day on due date

Previously, tasks and corrective actions were due at 00:00 on the due date (beginning of day), and there was some inconsistency in when the system displayed tasks and corrective actions as overdue.

Now, tasks and corrective actions are now due at 23:59 on the due date (end of day), and won't be considered or displayed as overdue until 00:00 the following day (one minute later). Time zones won't affect this; the due time is always 23:59 regardless of what time zone you're in.

Print list views as displayed

Previously, when you printed a list view where you had hidden one or more columns, all of the columns would still print. Now, if you hide a column in a list view, it won't appear when you print the list view.

Open corrective actions in audit history

Previously, when you viewed an audit in history, you could see, on the Findings sub tab, any corrective action items generated during the audit, but you couldn't open those corrective actions to view the details.

Now, we added clickable links so you can, if you have permission, view the corrective action details (in a read-only window) from an audit in history.

Acknowledge button disabled after use

Previously, if you published a document that required acknowledgment by an asset, the Acknowledge button would remain enabled after you clicked it, even though the system showed that it had been acknowledged. Now, the button is disabled after you acknowledge the document from an asset.



Note

Documents that required acknowledgment by individuals weren't affected.

Open linked items on requisitions in Onboard > Requisitions

Previously, if you only had permission to the Onboard menu and tried to open a linked item on a requisition, nothing happened. Now, as long as you have permission to view the linked item, it will open in Onboard > Logs in a separate browser tab.

Checklists become "in progress" when you add notes, tags, or attachments

Previously, if the only thing you did in a checklist was add a note, tag, or attachment, the checklist wasn't considered "in progress" and those items were deleted when you clicked Finish Later or clicked away from the tab. Now, adding just a note, tag, or attachment to a checklist changes the status to "in progress," and the item won't be deleted when you leave the checklist window.

New Asset column displays where you completed a form that generates a personnel record

For customers who use the Forms module, we added a new Asset column in the following locations:

- Onboard > Personnel > Crew tab > person > History sub tab
- Management > People > People tab > person > History sub tab
- Management > People > History tab

When someone is selected in a form that's configured to generate a personnel record, a new Asset column in history displays the name of the asset where the form was completed. If you're viewing the history of personnel records on one asset, you'll also see any personnel records generated from forms completed on other assets.

Type	Asset	Updated	Category
<input checked="" type="checkbox"/> Near Miss Report	*Plissken	07/18/2017	Personnel Record
<input checked="" type="checkbox"/> Merchant Mariner License	-	07/04/2019	MMD

When someone completes a form that generates a personnel record, the Asset column displays the name of the asset where the form was completed.

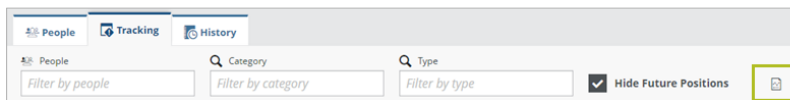


Note

Although you can configure a form template to update a personnel certification when the form is completed, the list view doesn't display the asset name for personnel certifications updated through a form. This is because the certifications are associated with the person, not the asset.

Export list of certifications to Excel

We added a new Export to Excel button to the Management > Assets > Tracking tab so you can quickly export a list of certifications to Microsoft Excel. Use the filters to display the information you're interested in, then click the Export to Excel button to export the results as a .CSV file that you can open in Excel.



Click this button to export a list of certifications to Excel.

Warning messages for multiple users in the same checklist or form

We added the following warning messages to prevent users from accidentally overwriting each other's work when working in the same form or checklist:

- **"This data is also being edited by (user name)."** You'll see this message if you and another user are working in the same checklist or form, but it won't block you from

making changes.

- **"This data has been updated. Click here to refresh."** You'll see this message if another user saves or submits the item you have open. If decide to refresh, please be aware of the following:
 - If you're working in a checklist, the system will exit the checklist without making any changes and return you to where you were before you opened it.
 - If you're working in a form in Onboard > Logs, and click refresh, the other user's changes will be displayed.



Note

These messages will only appears if all users open the same form or checklist on shore or on the same local asset installation.

Type list for activity types

For customers who subscribe to the Event Logs module, we made a small change on the Setup > Events > Activity Types tab. Previously, when you added or edited an activity type, you could ignore the Primary, Running To, and Running From check boxes because they were used only for Helm CONNECT Jobs. However, in Version 1.18, we replaced these three check boxes with a new Type list that provides the following four options:

- Primary
- Running To
- Running From
- None

Now, when you add or edit an activity type, you're required to select an option from this list. If you don't use Helm CONNECT Jobs, we recommend you select the new **None** option.



Note

Any activity types you had already set up in Version 1.17 will be assigned the None type automatically when you update to Version 1.18.

Speed improvements

We made some system improvements so your information loads more quickly in the following locations:

- Setup > Templates > Inspection tab
- Setup > Templates > Maintenance tab
- Onboard > Requisitions > Requisitions tab
- Maintenance > Requisitions > Requisitions tab

We also improved loading time for checklist items in the following locations:

- Onboard > Logs > To Do list
- Onboard > Overview > To Do tab
- Maintenance > Overview > Advanced Search tab

In-progress indicator when you open tasks and corrective actions

Task and corrective actions can take some time to open. Previously, it wasn't always obvious that the system was still loading the item. Now, the system displays a window with a spinning propeller "in-progress" indicator to let you know that the item is loading.



Vertical scroll bar now appears in the Schedule Audit step in Google Chrome

We addressed an issue where the vertical scroll bar didn't appear if you used the Google Chrome browser when you scheduled an audit. Now, if the contents of the Schedule Audit window don't fit on the screen, the vertical scroll bar appears on the right side of the

browser window.

Improvements to printed tasks and corrective actions

We made the following improvements when you print tasks and corrective actions:

- **Custom field contents:** Previously, when you printed tasks and corrective actions that contained custom fields from history, the contents of those custom fields wouldn't appear in the printed copy. We fixed that.
- **Custom check box fields:** Previously, when you printed an open task or corrective action that had a check box custom field, the printed version would display true or false to indicate whether or not the check box was selected. Now, the printed copy displays Yes or No instead.

Time values now save consistently in Microsoft Edge and IE 11

We addressed an issue where time values you selected that didn't end in 0 or 5 might not be saved if you were using Microsoft Edge or IE 11. Google Chrome users weren't affected by this issue.

Add Corrective Actions button in forms now appears only when it's supposed to

For customers who subscribe to the Forms module but not the Corrective Actions module, we addressed an issue where, if a form had a shore approval section, the Add Corrective Action button and Corrective Action side tab would appear when you went to approve the form on shore. This could result in a situation where you were able to generate corrective actions that you had no way to manage. Now, the button and side tab won't appear when you're approving a form unless you also subscribe to Helm CONNECT Compliance or the Corrective Actions module.

Due date in tasks and corrective actions in history ignores time zones

Previously, when you viewed a task or corrective action in history, the value in the Due Date field in the header or the Due field in the Plan section could change depending on which time zone you were in. Now, the due date value will always be the date set in the time zone where you originally created the item.

Forms generated by crew change events display consistent due date and time

Previously, a form generated by a crew change event could display a different due date and time depending on the time zone where you viewed it. The information could also vary depending on where in Helm CONNECT you viewed the form. Now, the form will be due at the end of day in the time zone where the crew change occurred, and the information will be the same whether you view it on the Onboard > Logs, Maintenance > Overview > Advanced Search tab or from the Forms report.

Asset tooltip for published documents now displays the division

On the Compliance > Documents > Library tab, the tooltip used to display "All assets in undefined" if the document had been published to all assets in that division.



Now, when you publish a document too all assets, the tooltip displays the division where the document was published.



Items sort order in the Onboard > Logs > To Do list is consistent

We addressed an issue where the work items within each category of the Onboard > Logs > To Do list were sorting randomly. Now, work items sort consistently, first by scheduled date, estimated date, or due date (whichever occurs first), then alphabetically by name, then alphabetically by component name, if it exists.

Linked documents don't disappear when you duplicate a template

We addressed an issue where, if you duplicated a template that had a linked document, the document was deleted from the original template and added to the duplicated template. Now, the linked document exists on both the original and the duplicated template. This affected Inspections, Maintenance, Inventory, and Forms templates.

Documents can now be linked to previously published maintenance templates

We addressed an issue where, if you published a document to a specific asset, then tried to link that document to a maintenance template that had already been published to that asset, you couldn't do it. Now you can.

Cumulative reading Due In values updated immediately

Previously, when you completed a checklist where you recorded cumulative reading values for a component, the due values on related maintenance routines that were scheduled by cumulative readings wouldn't update unless you refreshed the page. This affected the cumulative reading type Due In values displayed in Onboard > Logs, Onboard > Overview, and Maintenance > Overview > Advanced search.

Now, when you complete a checklist where you record cumulative readings for a component, the Due In values for the related maintenance routines are updated immediately.

Better warning when you try to attach large files

We addressed an issue with tasks, corrective actions, form templates, and requisitions. Previously, if you tried to attach a file larger than the maximum file size, the file name would be added to the attachment list, but, when you clicked Save or Publish, the screen would lock. The yellow warning message appeared to let you know the file was too big, but didn't tell you the maximum file size. You had to refresh the screen to unlock it and continue working.

Now, the system checks the attachment file size as soon as you select it. If it's too large, the yellow warning message appears immediately and tells you what the maximum file size is. In addition, the filename won't be added to the attachment list and the screen won't lock when you click Save or Publish, so you can continue working normally.

Helm CONNECT Jobs

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

Interval billing

Instead of billing your customers for each individual item of work, you now have the option to include multiple orders on a single invoice and bill for the work that took place during an interval of time. We provide a range of pre-set intervals including weekly, bi-weekly, semi-monthly (1st and 16th), monthly, and quarterly. You can also use interval billing to send invoices without an order.

Select this option to bill work at the end of an interval.

If you're billing by interval, you can select the type of interval and when it starts.

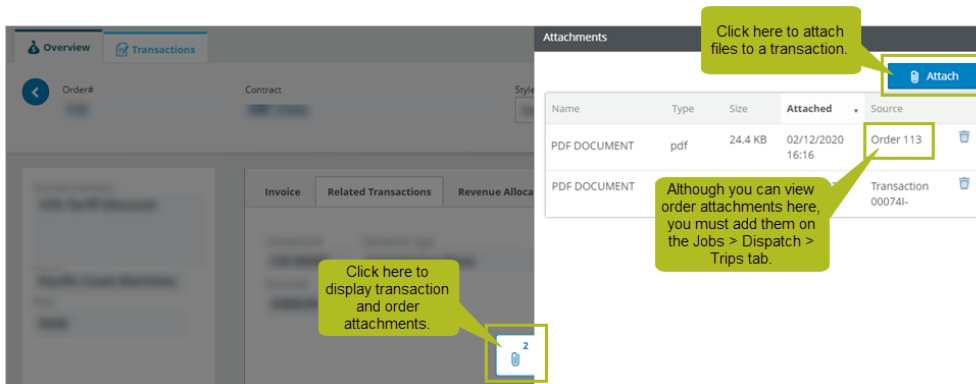


Note

Interval billing is available to Helm CONNECT Jobs subscribers at no extra cost. However, in Version 1.18, it's turned off at your tenant level by default. Please contact your account manager if you have any questions about this feature or if you'd like to have it turned on.

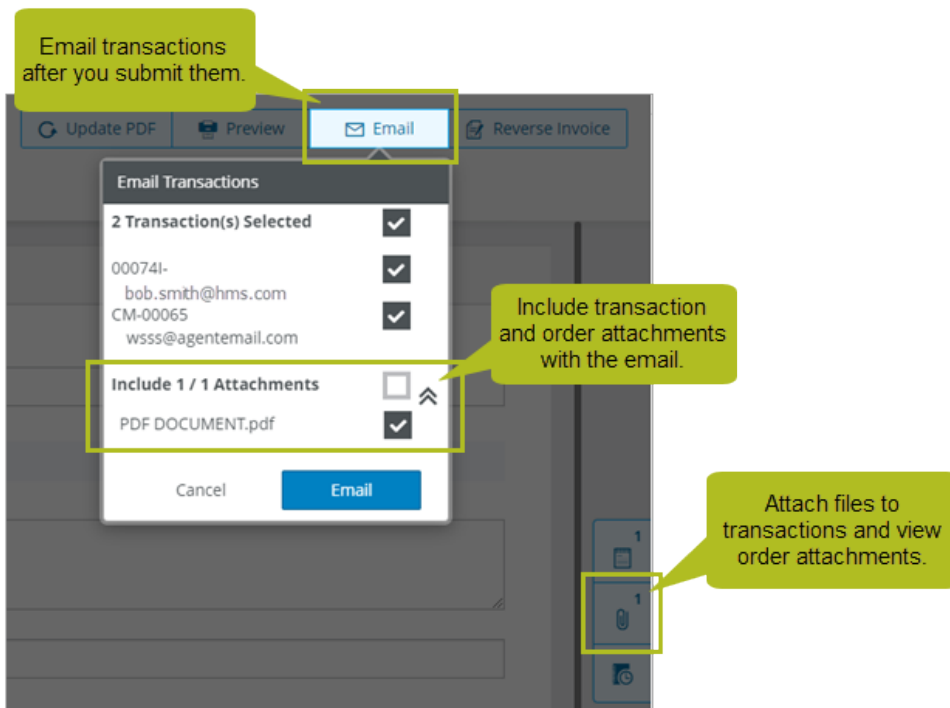
Attach files to transactions

On the Jobs > Billing > Transactions tab, we added a new Attachments side tab in the transactions detail view that allows you to attach files to your transactions. From here, you can also view attachments that were added to the order from the Jobs > Dispatch > Trips tab.



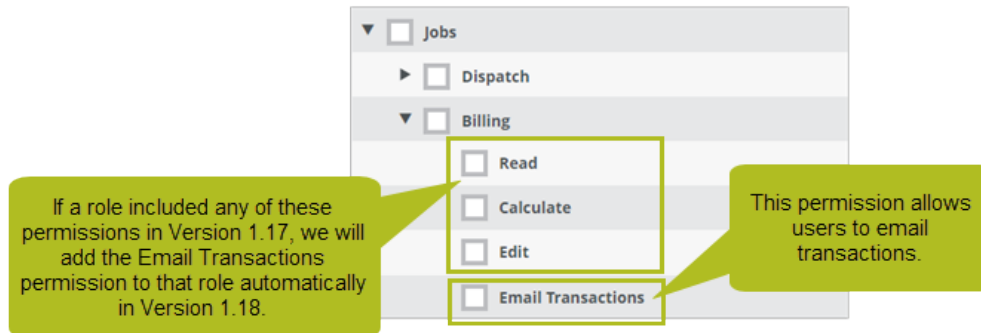
Email transactions and include attachments

On the Jobs > Billing > Transactions tab, we added a new Email button in the transactions detail view that allows you to email transactions to a customer as soon as you submit the invoice. You can also include any of the files you had already attached to the order on the email, up to a combined size of 7.5 MB.



New Email Transactions permission

On the Setup > Users > Roles tab, we added a new Email Transactions permission under the Jobs > Billing group. Any role that had at least one of the Read, Calculate, or Edit permissions in that group in Version 1.17 will automatically have the new Email Transactions permission in Version 1.18.



Custom fields for transactions

We added a new Transaction Configurations tab to Setup > Invoicing that allows you to set up custom fields for your transactions. You can configure transaction custom fields by division and have the option to make them required.

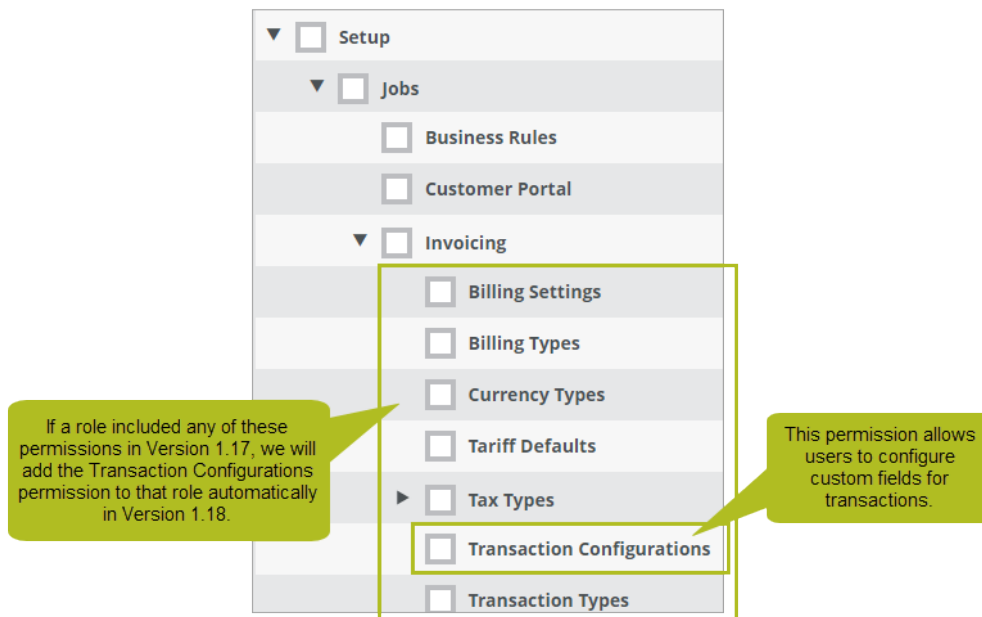


Note

If you make a transaction custom field required, users won't have to complete it until they submit the transaction.

New Transaction Configuration permission

On the Setup > Users > Roles tab, we added a new permission for the Transaction Configurations tab under the Setup > Jobs > Invoicing group. Any role that had any of the permissions in that group in Version 1.17 will automatically have the new Transaction Configurations permission in Version 1.18.



Time zone handling for billing

Some of our customers operate across multiple time zones, with the work happening in one time zone and the invoices being created in a head office in a different time zone. In Version 1.18, you now have the option to display the dates and times on your invoice in the time zone where the work took place, instead of in the time zone where the billing occurred.

Type list for activity types

Previously, when you added or edited an activity type on the Setup > Events > Activity Types tab, you could select one of three check boxes: Primary, Running To, or Running From. If none of these options applied to the activity type, you could leave all three check boxes clear. In Version 1.18, we replaced the three check boxes with a new Type list that provides the following four options:

- Primary
- Running To
- Running From
- None

Now, when you add or edit an activity type, you're required to select an option from this list. If the activity type is not a primary, running to, or running from activity, we recommend you select the new **None** option.



Note

If you had any activity types in Version 1.17 that didn't have one of the check boxes selected, they'll be assigned the None type automatically when you update to Version 1.18. You can change this, if necessary.

Flag for blocked ships

On the Setup > Ships > Ships tab, we added a new Blocked check box on the ship detail view so you can indicate if a ship has been blocked. On orders, blocked ships will display **Blocked** in the Status column in the Ships list.

Invoice agents based on the default tariff

Previously, if your billing deferred to the default area tariff, you could only bill to customers not agents. In Version 1.18, on the Setup > Invoicing > Tariff Defaults tab, we added a new Tariff Bill To list that allows you to select either Agent or Customer at the division or area level.

Include check box on trips correctly aligned

We addressed a small cosmetic issue on the Jobs > Billing > Overview tab. When you're calculating billing for your trips, the label for the Include check box on trips is no longer hidden by the check box.

Helm CONNECT Personnel

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

Export list of certifications to Excel

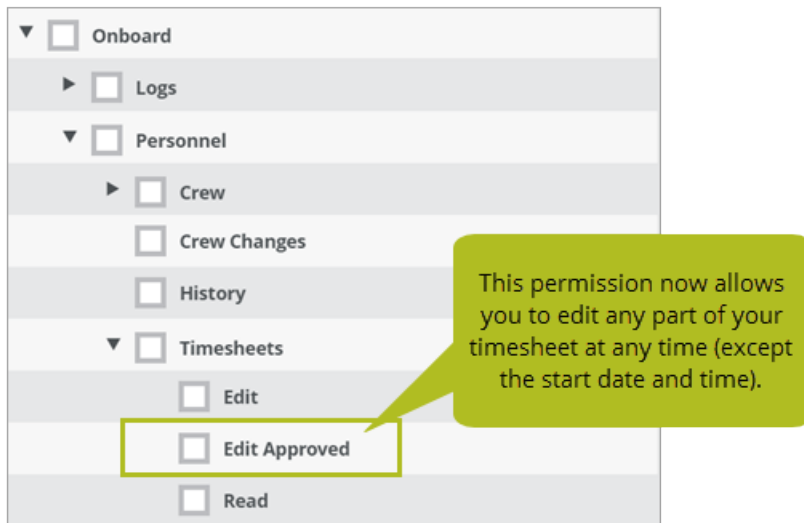
We added a new Export to Excel button to the Management > People > Tracking tab so you can quickly export a list of certifications to Microsoft Excel. Use the filters to display the information you're interested in, then click the Export to Excel button to export the results as a .CSV file that you can open in Excel.



Enhanced Edit Approved permission for timesheets

Previously, if you had the Edit Approved permission for the Onboard > Personnel > Timesheets tab, you could only add, edit, or delete a timesheet until the Crew Off was saved; once the Crew Off was saved, you could no longer add, edit, or delete the timesheet.

To give you more flexibility, we changed the Edit Approved permission so you can now edit any part of the timesheet at any time. The only exception is the start date and time, which you can't change.



Longer date range in the schedule

To make it easier to view longer rotations, we increased the date range on the Personnel > Schedule > Schedule tab from 91 to 125 days. You can now view schedules with date ranges of up to 125 days at once, including total work amounts and any crew scheduling conflicts for that date range.

New links from Schedule tab to Crew Changes or History tab

In Personnel > Schedule, to make it faster and more efficient to edit planned or pending schedules, we added links to take you from the Schedule tab to either the Crew Changes or the History tab.

12/21/2019 - Gerald Miller

17th - 7th New

Asset * MV Calvin Crew Member * 65508 - Gerald Miller

Position Group * Deck Crew Position * Deckhand

Cost Center Regular Default Override Earning Code Earning Code

Start Amount * 1 Amount * 1 End Amount * 1 Payroll Class Deckhand - Class 1

Start * 12/17/2019 08:00 End * 01/07/2020 00:00 Onboard On shore

Payroll [View Payroll Details](#)

Earning Code ATO Paid Earning Code Holidays

Earning Code Overtime Earning Code Regular Pay

[View Crew On](#) [View Crew Off](#) Cancel

Click one of these links to jump to either the Crew Changes or History tab, depending on the status of the crew change.

Confirmation message before you deny a crew change

When you deny a crew change on the Personnel > Schedule > Crew Changes > Pending sub tab, the system moves it to the History tab and deletes it from the Personnel > Schedule tab as well as from the Onboard > Crew Changes and the Onboard > Timesheets tabs.

Previously, when you denied a crew change, there was no indication that you were about to delete it. Now, when you click Deny on a crew change, you'll see a message that asks you if you want to delete the crew change, and you'll have to click Delete to continue.

Edit Deny Approve

Delete this crew change?

Cancel Delete

This message is new.

Delete individual payroll transactions

On each payroll card on the Personnel > Payroll > Payroll Details tab, we added a new Remove Transaction button that allows you to delete that person's payroll transaction and any related bank records. Once you delete the transaction, you can use the Regenerate Payroll button to regenerate the person's payroll manually.

Pay		December												Total
Code		Mon 16	Tue 17	Wed 18	Thu 19	Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26		
HO-22 A425 000006 ALU											50.00		50.00	
HO-22 A425 PL0224 000006 HP 0 0											100.00		100.00	
HO-22 A425 PL0224 000006 RP 0 0			50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	25.00	525.00	
Total Work: 10.5 Total Pay: 675.00														
Banks														
Accumulated Time Off	Net Period Total													
	475 / 9.5													

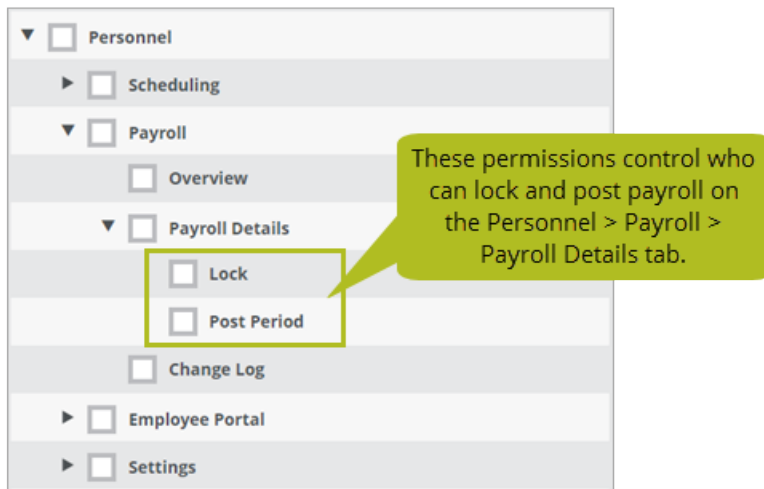
Delete pay periods

Previously, you couldn't delete any pay periods that had ever had payroll generated for them. Now, if you delete all the payroll transactions in a pay period, you can delete that pay period on the Setup > Payroll > Pay Periods tab. If there are any transactions left in a payroll period, the check box beside the payroll period's name on the Pay Periods tab will not be available.

Separate permissions for locking and posting payroll

We added two new permissions for the Personnel > Payroll > Payroll Details tab so you can control who can lock and post payroll:

- **Lock:** This permission allows you to lock a payroll period so that no more schedules can be approved. It also allows you to unlock a payroll period, if necessary.
- **Post Period:** This permission allows you to post a payroll period so that it can't be edited anymore. It also allows you to unpost a payroll period, if necessary.



Important note

Once you upgrade to Version 1.18, any users who previously had the Payroll Details permission will automatically have both the Lock and Post Period permissions, which is equivalent to the permissions they had in Version 1.17. After updating to Version 1.18, if you want different roles to have different permissions, you'll need to update your users' roles to properly distribute the new Lock and Post Period permissions. If you have any questions about this, please contact your account manager.

Improvements to the Lock and Post Period buttons

On the Personnel > Payroll > Payroll Details tab, we made the following improvements to the way the Lock and Post Period buttons look and behave:

- Both the Lock and Post Period buttons now have icons to match the ones in the Payroll Period list.
- When you click the Lock button, you now see an Unlock button instead of the clickable Unlock text you used to see.
- When you click the Post Period button, you now see an Unpost button instead of the clickable text Unpost text you used to see. Also, we no longer display the Posted status to the right of the button. If the button label says "Unpost" then you know the period has been posted.

Names of deleted or inactive people now display correctly

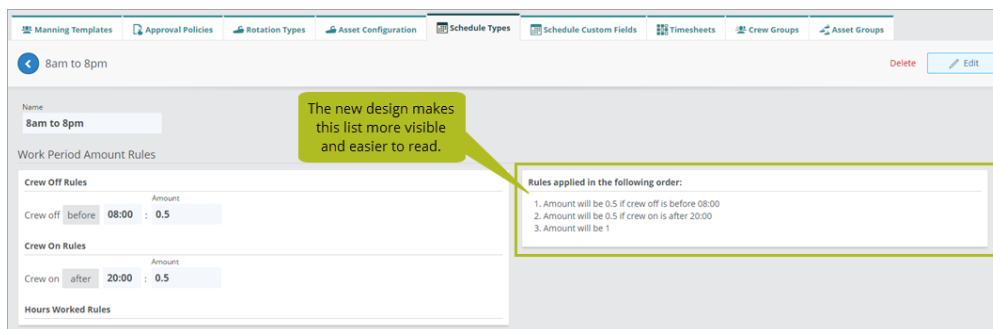
We addressed an issue throughout Helm CONNECT Personnel where, if a person had been deleted or made inactive, a blank space would display instead of their name.

New labels for deleted and inactive people

For consistency with the rest of Helm CONNECT, we now display (deleted) or (inactive) labels behind people's names if they've been deleted or made inactive.

Improved visibility for the list of work period amount rules

When you configure work period amount rules for your schedule types on the Setup > Personnel > Schedule Types tab, your rules will be executed in the order you add them. This order is important, so we display a list to the right of the configuration area that tells you the order in which the rules will be applied. In Version 1.18, we made this list more visible and easier to read.

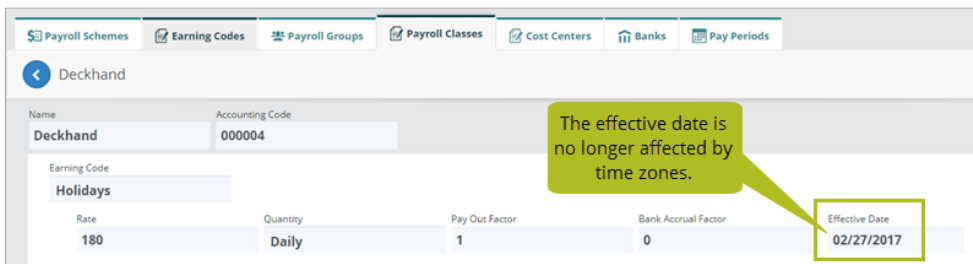


New labels for days off

For consistency with the new Days Off data source, we made two small label changes: on the Schedule sub tab in Management > People > People, we changed "No upcoming days booked off" to "No upcoming days off" and in the Display In list in Setup > Payroll > Earning Codes, we changed "Days Booked Off" to "Days Off."

Effective dates on payroll class earning codes no longer affected by time zones

We addressed an issue where the effective date for the rates on earning codes was affected by the time zone of the user. This was noticeable when you viewed the Effective Date field on the Setup > Payroll > Payroll Classes tab or when you generated payroll on the Personnel > Payroll > Payroll Details tab. Now, the effective date is always the same, regardless of where you view it.



See holidays on the Schedule without selecting an asset

On the Personnel > Schedule > Schedule tab, we mark holidays with a small blue triangle. In this release, we addressed an issue where this visual cue wouldn't display until you selected at least one asset from the Assets filter. Now they display without you having to select an asset.

Crew Scheduling Conflicts now displays name of asset

On the Personnel > Schedule > Schedule tab, in the Crew Scheduling Conflicts section, we addressed an issue where, if someone had a conflict with an asset that wasn't in their division, the message incorrectly displayed "Archived asset." Now, the message displays the asset's name.

Reports and custom fields

We made changes to our reports and custom fields in this release. If you use report data in systems 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.



Note

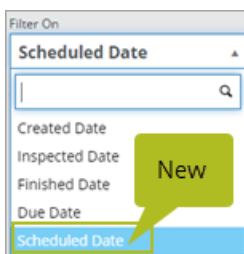
When we make any changes to a data source, we migrate any existing reports affected by the change automatically so that they use the updated data source.

New Scheduled Date field and filter

We added a Scheduled Date field to the following report data sources:

- Inspection Checklists
- Inventory Checklists
- Maintenance Checklists
- Tasks

For the checklist report data sources, we also added Scheduled Date to the Filter On list.



Improvements to the Forms Templates data source

We made the following improvements to the Forms Templates data source:

- **Responsible Parties column:** We addressed an issue where the Responsible Parties column in the report had been blank. Now, this column displays all people selected

in the Responsible Parties field in a form template header.

- **Shore Only templates:** We addressed an issue where "shore only" form templates would appear in the report only if the Include Deleted Assets filter was selected. Now, shore only templates will appear in the report by default unless you filter them out.

New Est Daily Usage field in Maintenance Templates data source

We added a new field to the Maintenance Templates data source: Est Daily Usage. When you add this field to your report, it displays the information you entered when you scheduled a maintenance template to be due based on a cumulative reading type milestone, such as running hours.

Name	Effective Date	Frequency (Cumulative Readings)	Est Daily Usage
20000 hr - Oil Change on the Port Main Engine	5/1/2016	20000 hr Running Hours	24 hr Running Hours
500 Hr. Port Generator Service	10/22/2019	500 hr Running Hours	12 hr Running Hours



New Interval Billing Trips data source

We added a new data source called Interval Billing Trips so you can report on any trips attached to a billed interval that weren't billed in that interval.

New fields in the Event Logs data source

We added two new fields to the Event Logs data source:

- Trip Number
- Job Number

New field in the Ships data source

To display information about the new blocked ships feature, we added a new Blocked field to the Ships data source.

Start and end dates for payroll periods

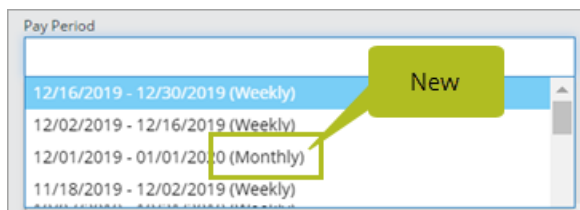
In the Payroll Transactions and Bank Records data sources, we added Start and End fields to the Payroll Period section so you can include the start and end dates of each payroll period in your reports.

New data source for days off

We added a new data source called Days Off so you can accurately report on who has scheduled for time off.

Pay Period filter now displays payroll group

In the Pay Period filter in the Bank Records, Bank Totals, and Payroll Transactions reports, we now display the name of the payroll group beside each pay period in the list.



Payroll Group filters now include option for crew with no payroll group

In the Payroll Group filter in the Bank Records, Bank Totals, Crew Changes, Payroll Transactions, People, and Work Periods reports, we now include a No Payroll Group option that allows you to report on crew who haven't been assigned to a payroll group.



Shared reports no longer limit divisional filtering in other reports that use the same data source

Previously, if someone shared a report with you, this would affect the divisional filtering in any other reports you owned or created that used the same data source as the shared report. If you used the Division filter, you would see only the data in the exact division you selected in the filter, and not any division below it, as you normally would. Now, if someone shares a report with you, this won't affect the division filtering in any of your other reports that use the same data source and you'll see all the information you have permission to view.

Checklist reports now show data from parent divisions

Previously, reports that used the Inspection Checklists, Inventory Checklists, or Maintenance Checklists data source displayed information only in the user's division and below. Now, these reports will display information from the user's division up/down, which means users will see information from parent divisions they have permission to see as well.

Helm CONNECT API

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

Changes to the Find Assets end point call results

We addressed an issue where Asset Type lists could contain unexpected commas, depending on how asset types were added or removed from the system. We removed the extra commas. This will affect API call results for the Find Assets end point.

New endpoints

We added the following endpoint:

- Transaction

New fields for existing endpoints

We added new fields to the following endpoints:

- Create/Update Task
- Find Tasks
- Find Task By ID
- Location
- Ship

New optional filters for existing endpoints

We added new optional filters to the following endpoints:

- Customer
- Find Companies
- Resource
- Ship