

## **Release Notes**

Version 1.20

## **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.

#### Improved performance on the Users and People tabs

To improve performance on the Setup > Users and Management > People tabs, we changed how we load the lists on these tabs. When you go to either tab, instead of loading the entire list at once, as we did previously, we now load just the visible items. Then, as you scroll down, we load the next group of items, and so on. This is a behind-the-scenes change, so you don't have to do anything different when you use these tabs, but we hope you notice improved loading times, especially those of you with large numbers of users or people in the system.

#### New filters on the Users tab

On the Setup > Users > Users tab, for improved performance and consistency with other areas of Helm CONNECT, we removed the search field, added several new filters, and added an Apply Filters button. Now, to use any of the filters, you must first select the ones you want then click the Apply Filters button to start your search.

Q Name	Q Employee Number		Q Division	Q Department		
Filter by name	Filter by employee n	umber	Helm Marine Services ×	Filter by department	v Q Apply	/ Filters * 👤 New Use
Can Log In Can Log I	In To Asset Can	Log In To Shor	re Active Employee	Limited To Assigned Ass	et	
						You must click thi
			A Hide filters O Clear select	ted filters		You must click thi button to apply you filters.
				ted filters Department	Position	button to apply yo
First Na Most of these filter *Capta new (other than	rs are	±.	A Hide filters O Clear select			button to apply you filters.

### Changed behavior for filters on the People tab

On the Management > People > People tab, for improved performance and consistency with other areas of Helm CONNECT, we added an Apply Filters button and changed how the Division and People filters behave. Now, to use the filters, you must first select the ones you want then click the Apply Filters button to start your search.

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🕾 People 🚺 Tracking	C History		You must click this button to apply your	
Division     Helm Marine Services ×	People     All people		filters.	Q Apply Filters * 🖉 New Person
The behavior of these two filters has changed.		Show all filters     Captain Connor      Captain Tarkerman      Captain Tarkerman      Certifications - expired by 201 days	Cear selected filters  *Pirsken, Captain 12/27/2019 8:00 AM	<ul> <li>⊗</li> <li>○ ≥ 4</li> </ul>

#### New color options for night mode

Our night mode feature enables you to use Helm CONNECT in low light conditions. In this release, we added two new color options for you to choose from: yellow and blue. Now, when you click the Toggle Night Mode button on the toolbar, you can toggle through the original red option plus the two new ones until you get to the color you want to use.

Click the <b>Toggle</b> <b>Night Mode</b> button until you get to the color you want to use	Image: Name     Image: Name     Image: Name     Image: Name       Togge: Name     Image: Name     Image: Name     Image: Name       Image: Name     Image: Name     Image: Name     Image: Name	Congret Marce Logical Tengre Marce Liber
>	Log Last 24 Hrs Last 7 Days Last 30 Days No finished work yet Work finished in the last 24 hours will be listed here.	tog tere 20 Hins Tony Care 20 Days No finished work yet Work finished in the Last 24 hours will be Roted Here.
	Toggete Nuglet Mode       O Log a new event       O Log a new tesk	Image: Single Night Mode         Image: Night Mode         Image: Single Ni
	Log Last 24 Hos Last 7 Days Last 30 Days No finished work yet Work finished in the last 24 hours will be listed here.	Log Last 24 Hor Last 7 Days Last 30 Days No finished work yet Work finished in the last 24 hours will be listed here.

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**Note** The Toggle Night Mode button will remain white for a few seconds after you click it so you can see it until you're finished selecting an option. After that, it will revert to whichever color you selected. If you need a little more time, refreshing your screen will turn it white again for another few seconds.

# Selecting the Can Log In check box again triggers a password reset email

On the Setup > Users > Users tab, if you clear the Can Log In check box on someone's profile and save your changes, that user's password will be removed from Helm CONNECT. If you later select the Can Log In check box again on the same profile, the user must reset their password before they can log in to Helm CONNECT. Now, to make this workflow easier, when you select the Can Log In check box again and save your changes, the system will send a password reset email automatically.

## Helm CONNECT Maintenance and Helm CONNECT Compliance

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

#### Propagate component readings down to their sub-components

Instead of having to enter readings for each component and for each of their sub components, your crew can now enter a reading for just the component and let the system apply that reading automatically to each sub component. By limiting the number of readings your crew have to enter, you can decrease the amount of time they spend recording readings as well as help reduce to data-entry errors. You can control which components can propagate their readings and which sub components can receive those readings.

#### Bulk correct maintenance templates

If you set daily ranges on your cumulative reading types and enter a reading outside the expected range while completing a checklist, you'll now see a new window called "Bulk Correct Maintenance Templates" that lists any maintenance templates affected by the out-of-range reading and allows you to correct when they're due.

	Bulk Correct Maintenance Templates			
Select only the	You entered 24 Running Hours (hr) fo correct the Due In value for 1 templa			Once you select the check box associated with this template, you'll be able to enter a new
templates you want to correct.	Main Engine - due every 1000 Running Hours	Updated Due In (Running Hours) 975	Corrected Due In (Running Hours) 975	value into this field.
	You entered 24 Running Hours (hr) fo Due In value for 1 template(s) corres			
	Main Engine Fuel Hose - due	Updated Due In (Running Hours) 475	Corrected Due In (Running Hours) 475	
	You entered 24 Running Hours (hr) fo value for 1 template(s) corresponding		(1.3). You can correct the Due In	
	Centre Engine - due every 1000 Running Hours	Updated Due In (Running Hours) 975	Corrected Due In (Running Hours) 975	
			Correct 1 Template(s)	
			Cancel Continue	

You must add a new permission called "Can Bulk Correct Maintenance Templates" to the roles of any users who need to see and use the Bulk Correct Maintenance Templates window.

▼	
Overview	
Requisitions	
▼ Settings	
Add New Task	
Assign Maintenance Tasks to specific individuals or ven	lors on Shore
Assign Maintenance Tasks to specific individuals or ven	lors in Dry Dock
	permission allows
Set Scheduled Dates	to see and use the Correct Maintenance
Can record cumulative readings outside	mplates window.
Can Bulk Correct Maintenance Templates	

# Validation to ensure multiple Replaced/Ok items aren't assigned to the same component

On the Setup > Templates > Maintenance tab, when you create a maintenance template, you should never assign multiple Replaced/Ok items to the same component. Doing so could cause inaccurate data in your history and reports if someone completes a checklist based on that template.

Previously, we didn't have any validation in place to ensure that you didn't assign multiple Replaced/Ok items to the same component accidentally. Now, if you create a new maintenance template or edit an existing one with multiple Replaced/Ok items assigned to the same component, you'll see a warning and won't be able to save the template until you correct your mistake.

**Important Note** If you have an existing maintenance template that contains this issue, and you edit it after updating to Version 1.20, you won't be able to save your changes until you correct the mistake. In addition, if someone tries to complete a checklist based on a template with this issue, they'll see a warning advising them to select **Replaced** for only one of the items then either select **Ok** for the other items or leave them blank.

### Estimated parts quantity displayed in Task windows

In the "Log a new task" and "Update Task" windows, on the Parts Used tab, a new "Est Qty" field displays how many of a selected part are currently in the asset's inventory. The value displayed in this field corresponds to the value on the Inventory > Inventory > Parts tab.

Log a new task	℃ Parts Used *	Schedule	0 Notes	▼ More	update an e	og a new task or existing one, the d displays how
Asset *	Part *	🕒 Add Pa			currently	selected part are in the asset's entory.
*Plissken		ING, Con. R ×	Est Qty <b>50</b>	Qty *	×	

Note This feature, including the Parts Used and Parts tabs, is available only if you subscribe to our Inventory module.

#### Filter changes on the Onboard > Overview > To Do tab

To improve performance on the Onboard > Overview > To Do tab, we changed the way we load the data on this tab. Instead of loading the data for all your assets immediately, as we did previously, we now wait for you to select one or more assets first. Then, as soon as you click the new Search button, we load the data for just the asset or assets that you selected. To make room for the new Search button, we also moved the item filter; it's now to the right of the tags filter.

			We moved this filter
			to a new location.
Filter by tags		Filter by item	
0 Unplanr	ned Tasks		0 Planned Tasks
			0
		To begin, select one or mor	e assets, then click Search.
		Filter by tags O Unplanned Tasks	

1	Note The installed version of this tab doesn't have an assets filter so the new Search but-
J	ton will only be visible only when using the Onboard > Overview > To Do tab from shore.

#### Attachments no longer allowed while creating tasks for multiple assets

In Version 1.8, we added a feature that allows you to quickly add the same task for more than one asset by selecting multiple names from the Assets field when you create the task. This creates multiple copies of the original task, one for each of the selected assets.

Previously, we didn't prevent you from attaching a file directly to the original task, which meant the system would try to upload a copy of the attachment to each of the selected assets at the same time. Now, to ensure the performance and stability of this feature, we no longer allow you to attach any files while you're creating the task. Instead, if you need to attach any files, we recommend that you attach them to the individual copies of the task.

#### Improvements to the Tasks section in history detail views

In the history detail view for forms as well as for inspections and maintenance checklists, we made the following improvements to the Tasks section:

- You can now rearrange the columns by dragging them to a new position in the table, and a new Column Selector icon allows you to hide or show specific columns. These changes will also be reflected in the print view.
- The "Reason" column is now called "Task".
- We added three new columns: External Number, Assigned To, and Due Date.
- We now display Notes and Attachments icons.

rnal Number	Asset	Filled By	Completed	Frequency	Due	Shown in	Tags			
1077	*Plissken	Allison McGreggor	10/27/2020 10:0		10/27/2020 12:00		1985			
Form F	Response Iter	ns								
Num * Ite									Value	
1 Ca	ategory									
1.1 Ite	em 1A						Click and hold t to drag column		fail	
			This colu	mn was			position in th	a table	Click this icor	n to hide
1.2 Ite	em 2A		rename				position in tr	le table.		
	em 2A			d from			posidon in d	le table.	or show col	
	em 3A	lew	rename	d from			position in t	ie table.		
1.3 Ite	em 3A	lew I Externa	rename "Reason"	d from to "Task"	E Assigned To	II Due Date	E everity	E LADIE.		
Tasks	em 3A	I Externa	rename "Reason" al Number	d from to "Task"	Assigned To Asset	I Due Date	7			umns ¢
1.3 Ite	em 3A	II Externa	rename "Reason" al Number 9 Task	d from to "Task"			II everity	I Status	or show col	umns ¢

**Note** The Tasks section is visible only if there were any tasks created by failing Fail/Pass or No/Yes/NA items.

#### Corrective actions displayed in history detail views for forms

In the history detail view for forms, we added a new Corrective Actions section that displays the corrective actions associated with a form.

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Form	Asset	Filled By se Items	Completed	Frequency	Due	Shown in	Tags			
um *	item								Value	
	Company									
.1	10000-000									
2	1000		The Corrective Ac	tions section						
.3	1000.000		displays the corre	ective actions			ick and hold the drag columns			
	Approval		associated with	n this form.			position in the	table.		k this icon to show colum
.1	1000 cm	fun								
Corre	ective Act	ions								
External	Number	I Name			• I A	signed To	Due Date	Status		
	1	Constitue action 1						1944	(	° 0 °
-										0.00

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	=	_	_	I

**Note** The Corrective Actions section is visible only if someone added corrective actions to the form by clicking **Add Corrective Actions** on either the Maintenance > Overview > Advanced Search or Compliance > Forms > Library tab during the shore approval stage.

## Helm CONNECT Jobs

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

#### New Apply Filters button and Location filter on the Dispatch tab

On the Jobs > Dispatch > Trips tab, for improved performance and consistency with other areas of Helm CONNECT, we added an Apply Filters button and changed how the filters behave. Now, to use the filters, you must first select the ones you want then click the Apply Filters button to start your search. We also added a new Location filter to the Trips tab that allows you to filter your list of trips by location, including any child locations.

IIII Trips IIII Planner 🕥 Templates		Click this button to apply your filters.		
If you use the date filter, you only need to click Apply	Reg. Date Pick Dates This Month	uppy your mere.	Templates	v 👪 New Order 👔
Difference to click Apply Difference to clic	Area Search areas by Name	Location Location	Trip Type Trip Type	Ship Ship Name/IMO/Callsign
Agent Agent	Customer Customer	Dispatch Status Dispatch Status New filter	Awarded To Awarded To	Reset

#### New Apply Filters button on the Overview tab

On the Jobs > Billing > Overview tab, for improved performance and consistency with other areas of Helm CONNECT, we added an Apply Filters button and changed how the filters behave. Now, to use the filters, you must first select the ones you want then click the Apply Filters button to start your search.

<b>À</b> Overview		you on	use the date filters, ly need to click Apply is if you pick a date				
Interval Trip Q	Find an Item		Ily, not if you use any he preset options.	Trio Start Date This Year	Pick Dates Trans. Date +/- 1 Month	Pick Dates	Apply Filters
Customer	ин то					lick this button to	
			A Hide filters		2	apply your filters.	

#### New filters on the Tariffs tab

On the Jobs > Tariffs > Tariffs tab, to help you find specific tariffs more quickly, we added a search field as well as filters for divisions and areas.

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Tariffs 🗧 Payable Charges 🕜 Fuel Tables			
Current Inactive Show All C Find a tariff	Division	Search areas by Name	💊 New Tari
Name Use this field to search for	* Division	e these filters to narrow the	Area
General Tarifi a tariff by name.		t of tariffs down by division	
General Tariff 2019	Helm Marine Service	and/or area.	

# Removing an operation area from a resource no longer removes it from the Trips tab

We addressed an issue on the Jobs > Dispatch > Trips tab where, if you removed an operating area from a resource on either the Setup > Ships > Resources tab or the Management > Assets tab, the name of that resource wouldn't display in the Resource field on jobs taking place in that operating area.

## Helm CONNECT Personnel

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

#### Option to hide empty payroll transactions cards

Option to hide empty payroll transactions cards On the Personnel > Payroll > Payroll Details tab, when you generate payroll, a new check box called "With No Payroll" lets you control whether or not payroll transaction cards are displayed for anyone who had no payroll during that period, including anyone who wasn't an active employee or who was deleted.

Payroll Period     07/06/2020 - 07/19/2020	V Crew			y Show	actuals Sho	w forecasted	With Except	ional Pay Only	With No Pa	yroll	transac who h anyone	t this checl tion cards ad no payn e who was leted. Clea	(like the or oll during t n't an activ	he below) he period, ve employ	for anyone including ee or who	Post P
PREV 1 2 3 NEXT > 27 pag	roll items Show	quantity Show	w total pay								was de		l transactio		ide empty	xceptional
Amy Davidson																c
A No pay lines exist Pay	July															
Code	6	7	Wed 8	11-u 9	Pri 10	11	5un 12	Man 13	54 14	15 No.	16	17	5.0 18	19	Work	Total
															0.0	0.0
Total Work: 0.0 Total Pay: 0.0 Banks																
Accumulated Time Off Net Perio	Total															~

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**Note** When you upgrade to Version 1.20, the With No Payroll check box will be clear (not selected) by default, which means that any empty payroll transaction cards will be hidden. If you want the empty payroll transaction cards to be displayed when you generate payroll, as they were in Version 1.19, you must select the With No Payroll check box.

## **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 Emergency Contacts data source

On the Reports > Reports tab, we added a new data source called Emergency Contacts. This new data source contains most of the fields from the Details and Emergency Contacts sub tabs in Management > People > People, including names, email addresses, and phone numbers. It also contains any custom fields that you add to the two sub tabs, as well as information about whether or not the person is an active employee.

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			- 1
-	_	_	- 1
	-	=	

**Note** The Emergency Contacts data source does not contain any of the fields from the Personnel, Crew Groups, Payroll Classes, or Rates sections on the Details sub tab because those fields are available only to Helm CONNECT Personnel subscribers.

As the Emergency Contacts data source provides access to potentially sensitive information, such as names and contact information, we created a new group in the permission tree for it called Sensitive Reports. Even if a user has permission to the Reports group, they will also need permission to the Sensitive Reports group to use the Emergency Contacts data source.

Management	
Reports	
▶ Setup	
► API	The second sector Description
Role Settings	The new Sensitive Reports group will include permissions to reports that contain
Extras	potentially sensitive information, including the new Emergency
Sensitive Reports	Contacts permission.
Emergency Contacts	

**Note** If you share a report that pulls data from the Emergency Contacts data source, the user you share it with will be able to view the contents of the report, even if they don't have permission to the Sensitive Reports group or the Emergency Contacts data source.

#### New behavior for Created field in two reports

Previously, the Created field In the Form Templates and Maintenance Templates reports displayed the date of the most recent change to the template. Now, it displays the date the template was created.

### New Propagate Reading field in Maintenance Templates report

The Maintenance Templates report now includes a Propagate Reading field.

#### New Receives Propagated Readings field in Components report

The Components report now includes a Receives Propagated Readings field.

#### New Opened Date field in Forms report

The Forms report now includes an Opened Date field.

### New Receives Propagated Readings field in Components report

The Components report now includes a Receives Propagated Readings field.

#### New fields in the AP Transactions and AR Transactions data sources

We added the following new fields to the AP Transactions and AR Transactions data sources:

- Approved By
- Created By
- Reversed
- Reversed By
- Submitted By
- Transaction Status

## Helm CONNECT API

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

#### FindUsers endpoint now shows all users who can't log in to asset

We addressed an issue where the FindUsers endpoint didn't always show all the users who can't log in to an asset.

#### New endpoints

We added the following new endpoints:

- Field Settings
- Parts
- Location Types

#### New fields for existing endpoints

We added new fields to the following endpoints:

- Components
- Create Or Update User
- Find Users