Release Notes

Version 1.20

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Contents

The platform

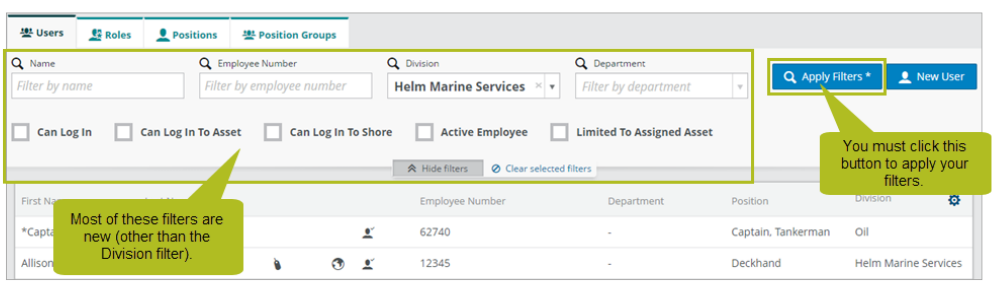
Our "platform" is our base product and includes the features and functionality shared by all our customers. Changes to our platform affect everyone, regardless of the product lines or modules you subscribe to. We made the following platform changes in this release.

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.

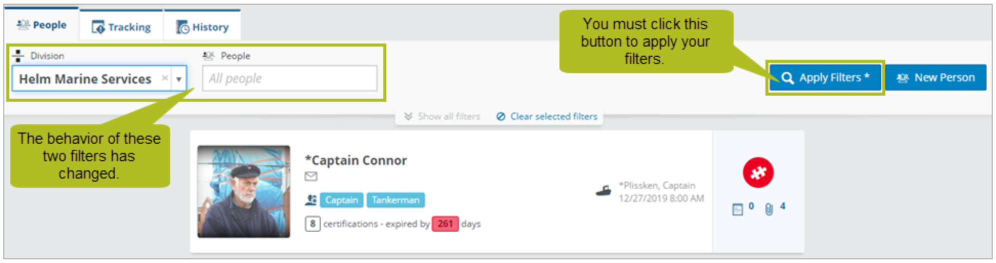
New filters on the Users tab

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.



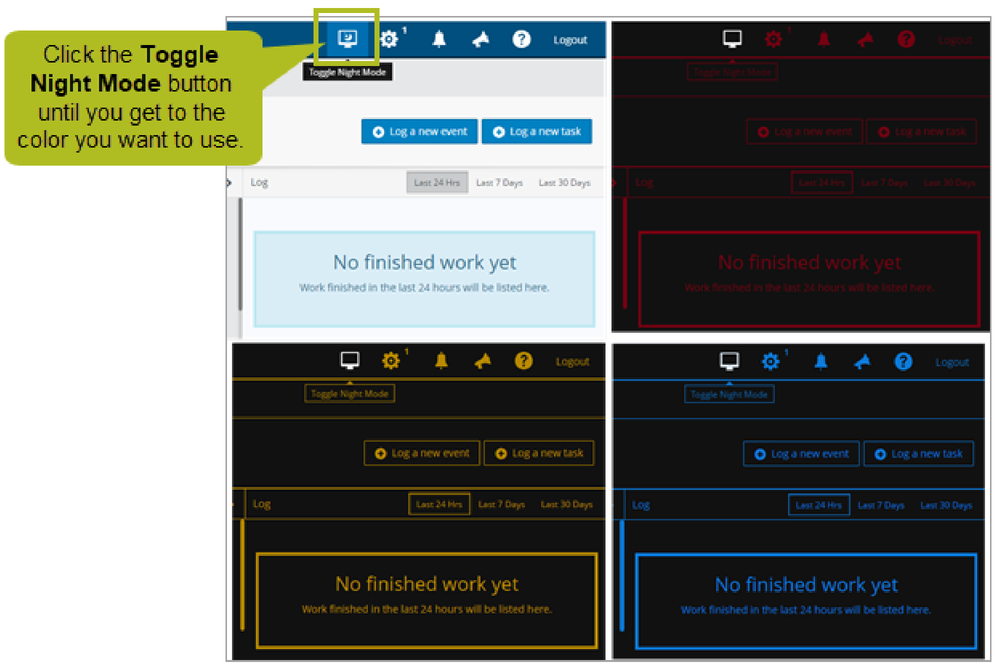
Changed behavior for filters on the People tab

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.



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.



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

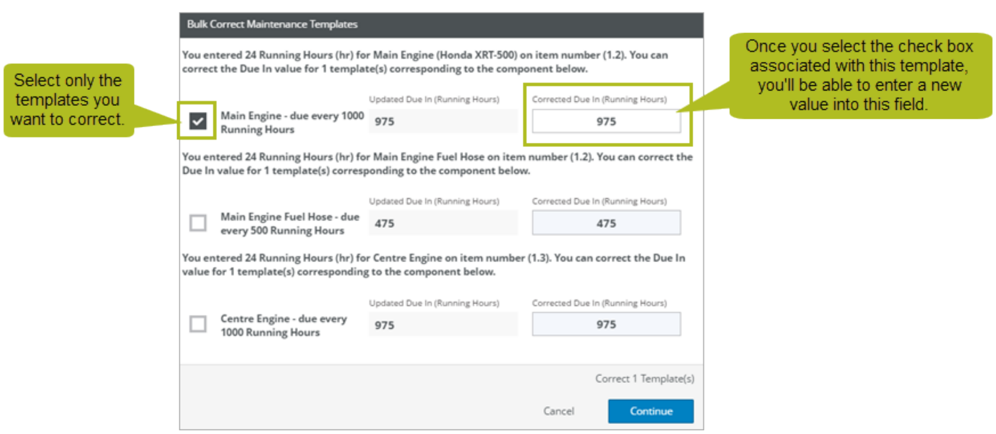
We made the following changes to Helm CONNECT Maintenance and Helm CONNECT Compliance in this release.

Propagate component readings down to their sub-components

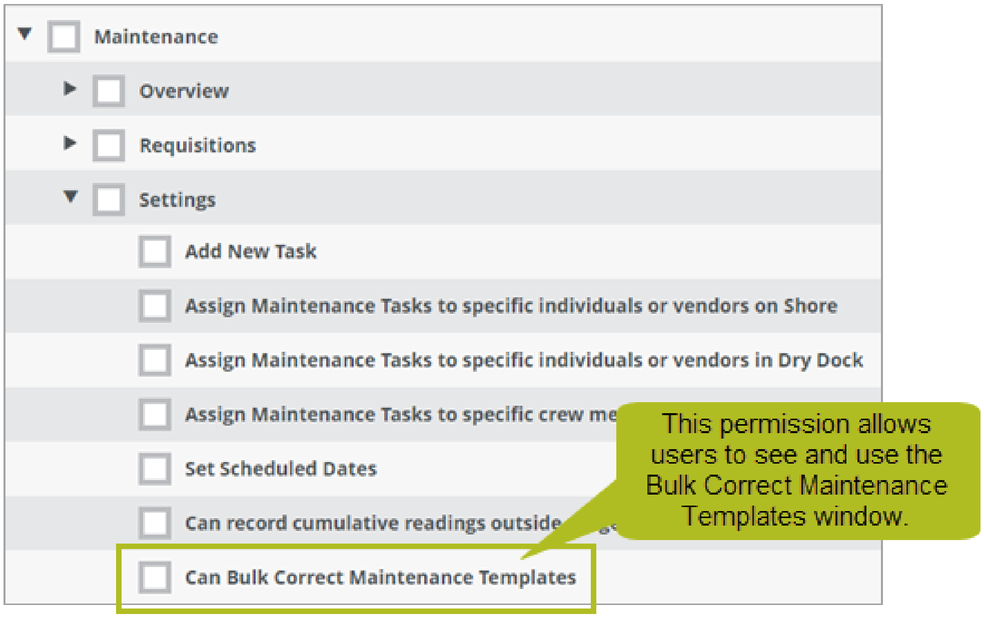
Instead of having to enter readings for each component and for each of their sub components, your crew can now enter a reading for just the component and let the system apply that reading automatically to each sub component. By limiting the number of readings your crew have to enter, you can decrease 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.



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.



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

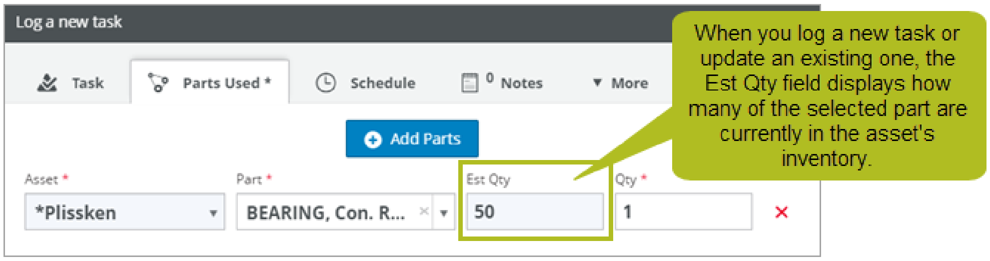
On the Setup > Templates > Maintenance tab, when you create a maintenance template, you should never assign multiple Replaced/Ok items to the same component. Doing so could cause inaccurate data in your history and reports if someone completes a checklist based on that template.

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

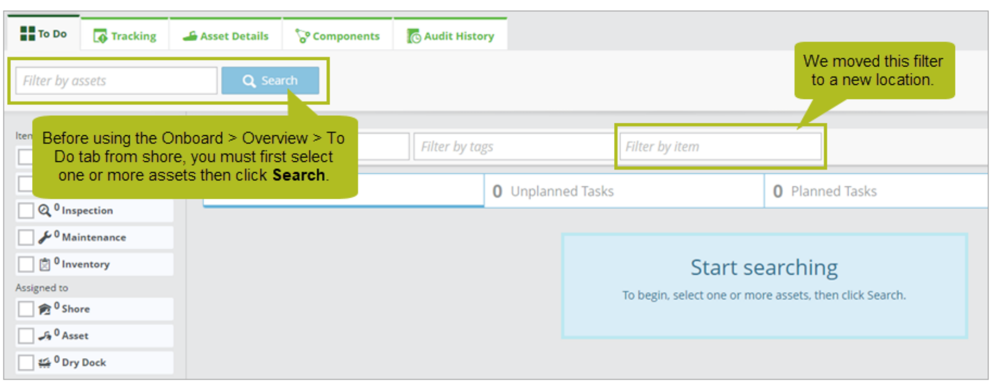
In the "Log a new task" and "Update Task" windows, on the Parts Used tab, a new "Est Qty" field displays how many of a selected part are currently in the asset's inventory. The value displayed in this field corresponds to the value on the Inventory > Inventory > Parts tab.



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.



Note The installed version of this tab doesn't have an assets filter so the new Search button 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

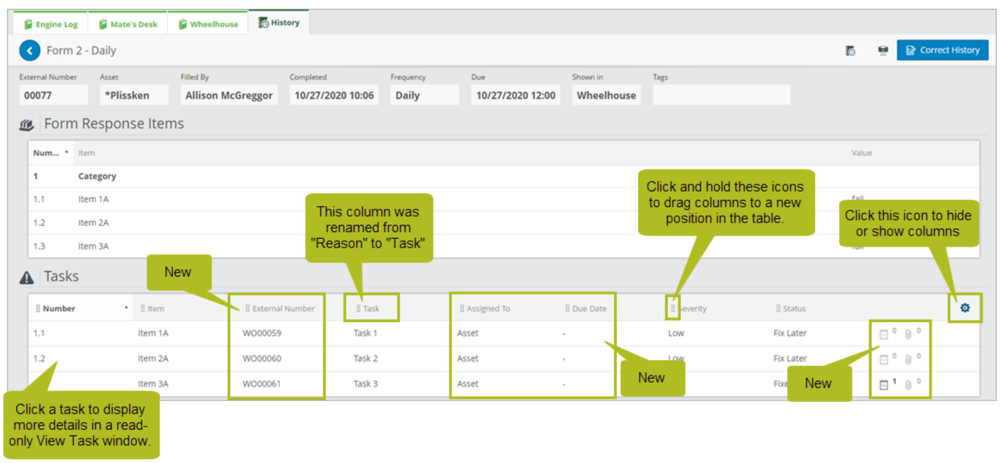
In Version 1.8, we added a feature that allows you to quickly add the same task for more than one asset by selecting multiple names from the Assets field when you create the task. This creates multiple copies of the original task, one for each of the selected assets.

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:

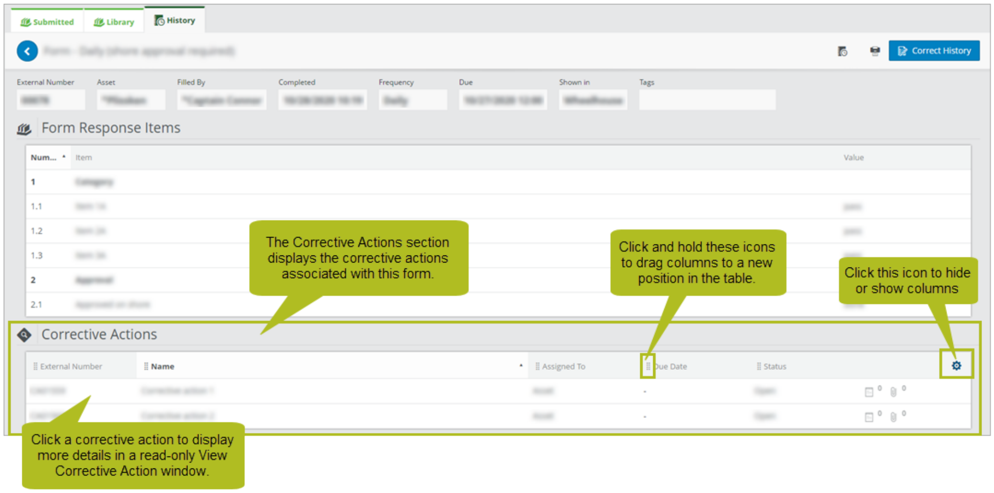
- You can now rearrange the columns by dragging them to a new position in the table, and a new Column Selector icon allows you to hide or show specific columns. These changes will also be reflected in the print view.
- The "Reason" column is now called "Task".
- We added three new columns: External Number,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



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.



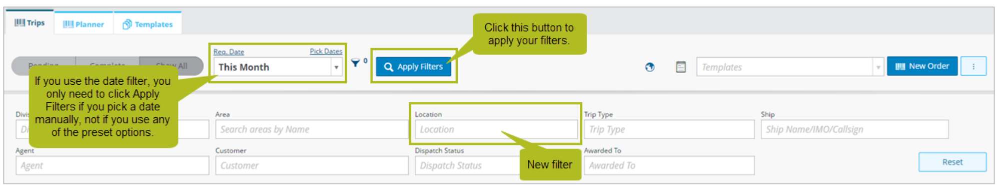
Note The Corrective Actions section is visible only if someone added corrective actions to the form by clicking **Add Corrective Actions** on either the Maintenance > Overview > Advanced Search or Compliance > Forms > Library tab during the shore approval stage.

Helm CONNECT Jobs

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

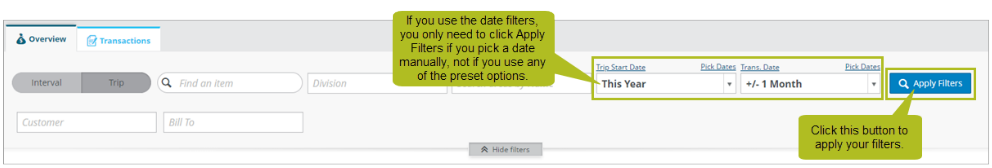
New Apply Filters button and Location filter on the Dispatch tab

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.



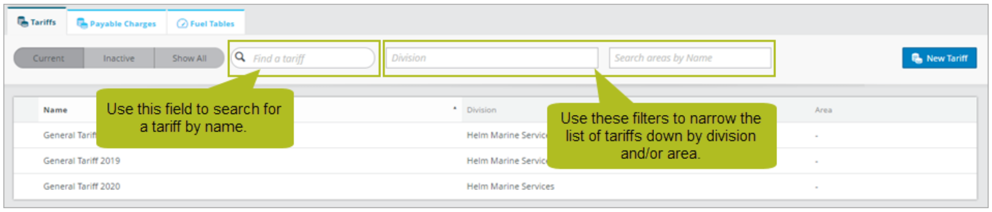
New Apply Filters button on the Overview tab

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.



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.



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

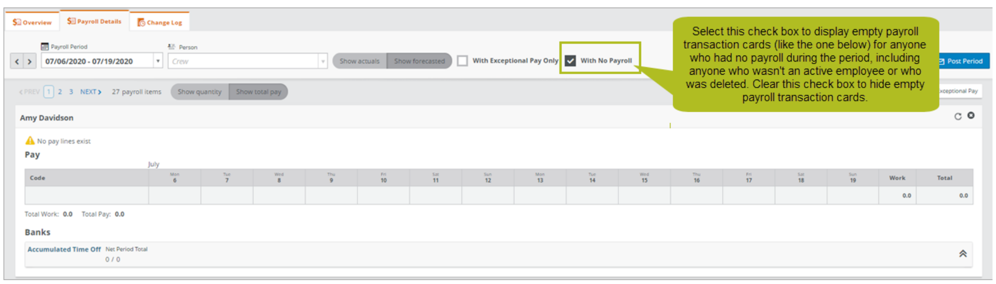
We addressed an issue on the Jobs > Dispatch > Trips tab where, if you removed an operating area from a resource on either the Setup > Ships > Resources tab or the Management > Assets tab, the name of that resource wouldn't display in the Resource field on jobs taking place in that operating area.

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.



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.

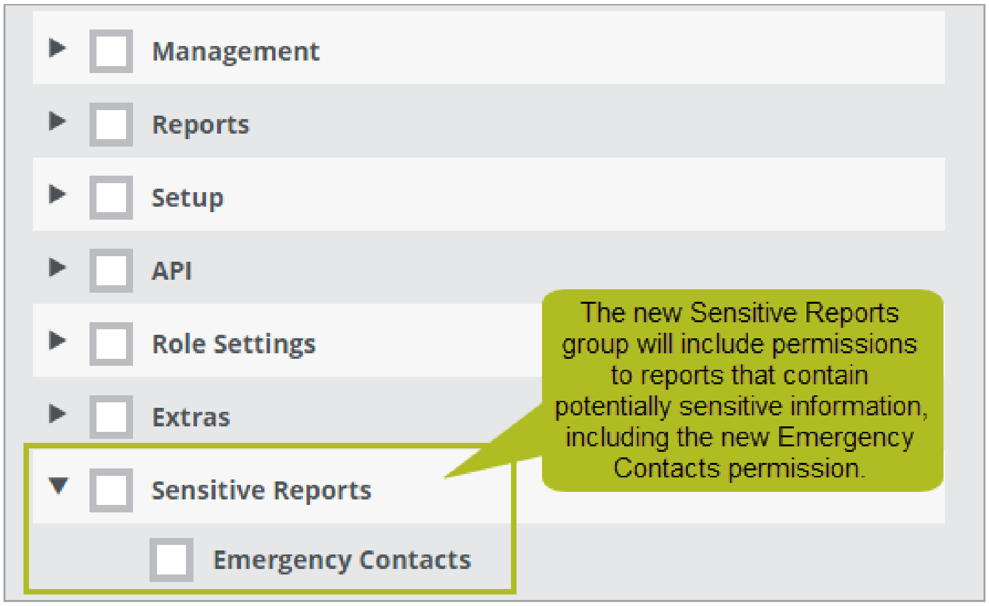
Note When we make any changes to a data source, we migrate any existing reports affected by the change automatically so that they use the updated data source.

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.

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.



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