



Release Notes

Version 1.21

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.

Faster installation and data transfer speeds

This release includes significant improvements to the speed at which you can install Helm CONNECT and transfer data between your assets and the shore. Helm CONNECT will now determine the optimal rate at which to transfer data and files, based on the speed of your internet connection and the amount of data waiting to transfer. You'll notice this improvement particularly when there are large amounts of data to send, as there can be during asset installations or with assets that aren't in regular communication with shore.



Note There are two key factors that impact data transfer between your assets and the shore: network bandwidth and the processing power of your asset computers. Customers who meet or exceed our recommended technical specifications for asset installations will be better able to take advantage of these speed improvements. For more information, please check out the "Technical specifications for installations" article on our support site, Helm U (helmu.ca).

Farewell to IE 11

As we've been reminding everyone for months, this is the release when we finally stop supporting Internet Explorer 11 (IE 11) and begin supporting Microsoft Edge. Our officially supported browsers are now the latest released versions of Google Chrome and Microsoft Edge. For more about email notifications in Helm CONNECT, check out the "Deprecating IE 11 in Version 1.21" article on our support site, Helm U (helmu.ca).

Helm CONNECT Maintenance and Helm CONNECT Compliance

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

Decline and reopen corrective actions

Previously, when a corrective action reached the verification stage, your only option was to approve and close it. Now, you also have the option to decline it. Once you decline it, you'll be required to enter details explaining when, why, and by whom it was declined.

The screenshot shows the 'Approve Corrective Action' interface. At the top, there's a header 'Approve Corrective Action' and a sub-header 'Corrective Action' with '2 Notes' and '0 Attachments'. The main content area shows a 'Corrective Action Description' of 'Paint handrails' with a status of 'Open 0 days (02/21/2021 08:35)' and a 'Severity' of 3 (indicated by three yellow triangles). Below this are fields for 'Tags', 'Created by' (Beverly Crusher), 'Location', 'Asset' (Helm Aircraft), 'Component', and 'Show in' (Default Space). A green checkmark icon indicates a 'Planned Corrective Action'. The 'Assign to' field is set to 'Asset' and the 'Assignee' is 'Jane McDougall'. The 'Due' date is '02/21/2021'. The 'Vendors' field is empty. The 'When was this done?' field is '02/21/2021'. The 'How was this done?' field contains the text 'I painted all the handrails on the boat.' At the bottom, there are three buttons: 'Cancel', 'Decline' (highlighted with a red box), and 'Approve Corrective Action'.

You now have the option to decline a corrective action. This will reopen it and send it back for additional work.

Once you decline a corrective action, it will be reopened and a thumbs down icon will indicate clearly that it has been declined.

Email notification for declined corrective actions

We added a new email notification to let the following users know when a corrective action has been declined:

- All assignees on the corrective action
- The user who finished the corrective action

For more about email notifications in Helm CONNECT, check out the "Email notifications" article on our support site, Helm U (helmu.ca).

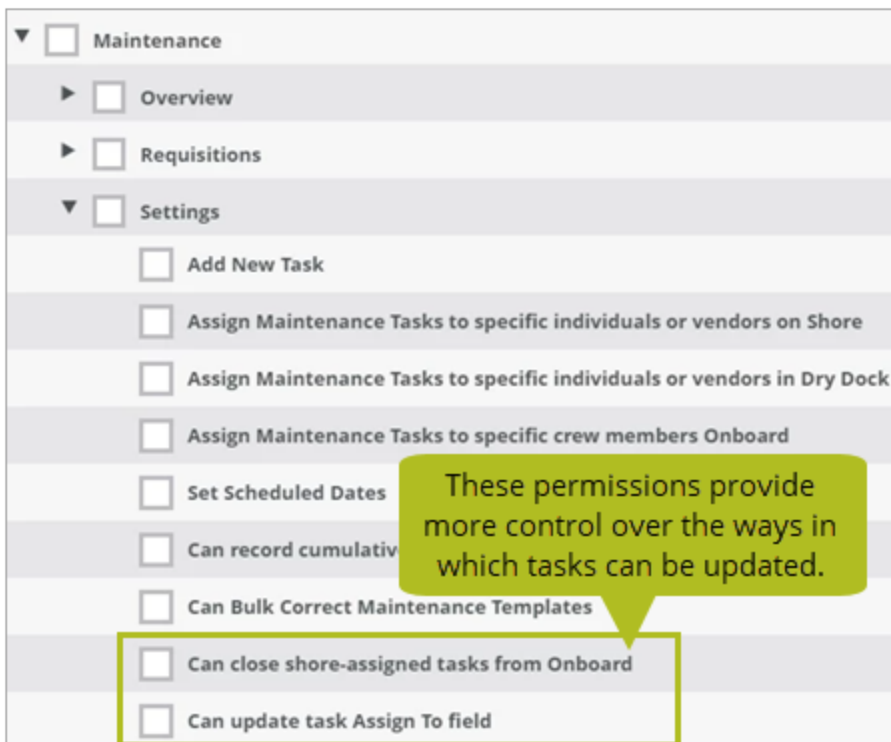
New permissions for tasks

On the Setup > Users > Roles tab, we added two new permissions to give you greater control over the ways in which your tasks can be updated:

- **Can close shore-assigned tasks from Onboard:** This permission controls whether or not a user working in Onboard > Logs or Onboard > Overview can finish a task that was assigned to shore. This permission doesn't affect their ability to finish a shore task while working on the Maintenance > Advanced Search tab.
- **Can update task Assign to field:** This permission controls whether or not a user with access to Logs, Overview, or Advanced Search can change the "Assign to" field on a task after it has been saved for the first time.



Note After the upgrade to Version 1.21, these two permissions will be turned on automatically for all users who were previously able to edit tasks. If you don't want specific users to have these permissions, you must remove them from their role.



New permissions for corrective actions

On the Setup > Users > Roles tab, we added two new permissions to give you greater control over the ways in which your corrective actions can be updated:

- **Can update corrective action Assign to field:** This permission controls whether or not a user working in Onboard > Overview, Advanced Search, Audits or Corrective Actions can change the "Assign to" field on a corrective action after it has been saved for the first time.



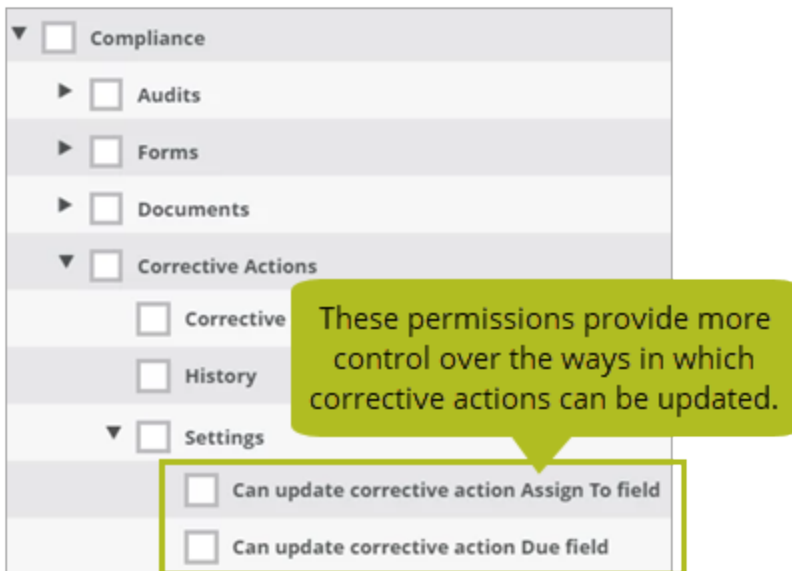
Note After the upgrade to Version 1.21, this permission will be turned on automatically for all users who were previously able to update the "Assign to" field. If you don't want specific users to have this permission, you must remove it from their role.

- **Can update corrective action Due field:** This permission controls whether or not a user working in Onboard > Overview, Advanced Search, Audits or Corrective Actions

can change the "Due" field a corrective action.



Note After the upgrade to Version 1.21, this permission will be turned on automatically for all users who previously had the Compliance > Audits > Audits permission. If you don't want specific users to have this permission, you must remove it from their role.



E-signatures for forms

Available now as a pre-release, e-signatures will provide your crew with a means of adding their digital signatures to forms. Please reach out to your account manager if you have any questions or would like to see a demo of this feature.

Completed audits display onboard when corrective actions are published

Previously, audits were only displayed on the Onboard > Overview > Audit History tab when all of their associated corrective actions had been closed. Now, audits will be displayed on the Audit History tab as soon as their associated corrective actions have been published.

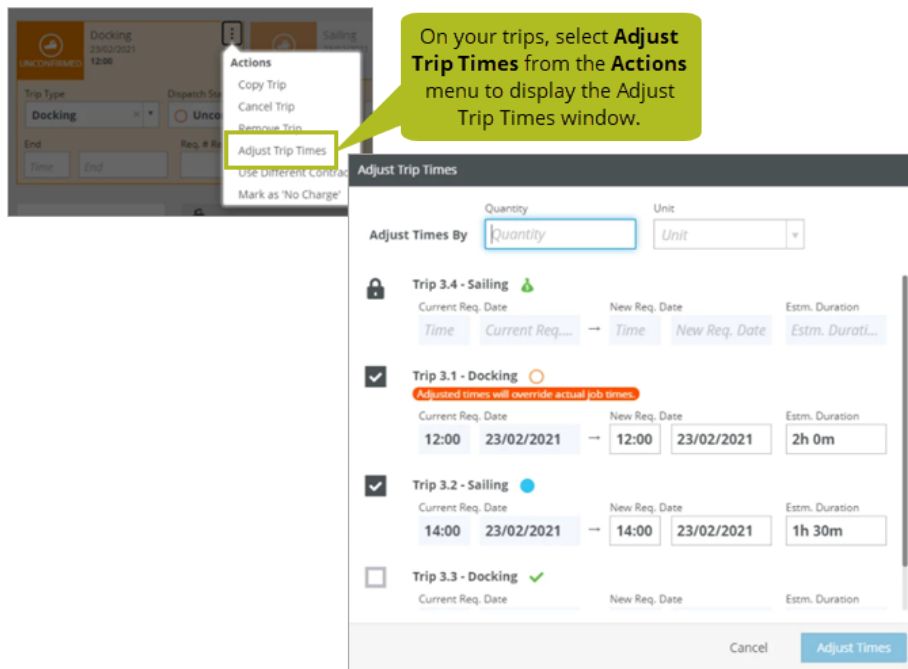
Helm CONNECT Jobs

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

Adjust trip times on multiple trips at once

When a delay or a change impacts several trips on an order, you can use the new Adjust Trip Times window to update the times on multiple trips at once instead of having to update each one individually. A few things to know about this feature:

- To display the Adjust Trip Times window, select **Adjust Trip Times** from the **Action** menu on any of the unbilled trips on an order.
- Although the Adjust Trip Times window will display all the trips on the order, you can only adjust the times on unbilled trips. Trips that have already been billed are displayed with a "locked" icon to indicate that they can't be adjusted.
- Any jobs or activities on the trips will also be updated but, if any of them contain actual times, you'll see a warning that you're about to override them.
- Although completed trips won't be selected by default when you first open the Adjust Trip Times window, you can select them manually and include them in your adjustment.
- From the Unit menu, you can choose to make your adjustment in minutes, hours, or days.
- You can adjust your trips by a maximum of 365 days (or the equivalent in minutes or hours).



Convert currency on the Overview tab

If you work with multiple currencies, you can now use a filter on the Jobs > Billing > Overview tab to quickly convert your trip amounts to a single selected currency. The converted amounts will be displayed in a new Converted Amount column. A few things to know about this feature:

- You must have one of your currencies configured as the default currency on the Setup > Invoicing > Currency Types tab.
- Any currencies that aren't your default must have an exchange rate entered on the Setup > Invoicing > Currency Types tab.

The screenshot displays a software interface for managing transactions. At the top, there are filter options for 'Interval' and 'Trip'. A search bar labeled 'Find an item' is present, along with a 'Division' dropdown. A callout box points to the 'Division' dropdown with the text: "Use this filter to convert the amounts for all trips to a selected currency." Below this, there are 'Track Date' and 'Pick Dates' sections, with a date range set to '+/- 1 Month' and an 'Apply Filters' button. A 'Show all filters' link is also visible.

Below the filters, a summary bar shows counts for various statuses: 6 Ready to Bill, 3 Unapproved, 0 Approved, and 0 Invoiced. A total converted amount of '\$1520.00' is displayed. A callout box points to this total with the text: "This will reflect the total converted amount."

The main part of the interface is a table of transactions. A callout box points to the 'Converted Amount' column with the text: "The converted amounts will display here." The table has columns for Status, Ship, Trip Type, Customer, From, To, Currency, and Converted Amount. The data rows are as follows:

Status	Ship	Trip Type	Customer	From	To	Currency	Converted Amount
Ready to Bill	SS PANCAKE	Docking	Victoria	Oak Bay M...	Inner Harb...	HAAC	-
Ready to Bill	EMMA MA...	Docking	Compu-GL...	Victoria	Compu-GL... Esquimalt	HAAC	-
Unapproved	SS PANCAKE	Docking	Compu-GL...	Victoria	Compu-GL...	CAD	\$120.00
Unapproved	-	Docking	Company	Halifax	Company	EUR	€500.00
Unapproved	-	Docking	Company	Seattle	Company	USD	US\$500.00
Ready to Bill	-	Docking	Compu-GL...	Victoria	Compu-GL...	-	-

Helm CONNECT Personnel

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

Full version of the Work Rest module now available

Work Rest is a set of tools to help you manage your crew's fatigue, and is the first of four major improvements that we're rolling out to Helm CONNECT Personnel. In our previous release, we introduced a shore-only version of Work Rest and now we're making the full version of this module available, including a new Work Rest tab under **Onboard > Personnel** for your crew to review and enter their work rest information, as well as data transfer between your assets and the shore.

FROM	TO	CREW																					
08/01/2020	08/07/2020	5 Crew Selected	<input type="button" value="FILTER"/>																				
<input type="checkbox"/> Working <input type="checkbox"/> Resting <input type="checkbox"/> On Watch <input type="checkbox"/> Traveling <input type="checkbox"/> Non-Compliant <input type="checkbox"/> NON-COMPLIANT																							
	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00									
08/01/2020																							
Beverly Crusher No Rule Group Day/Night - Day	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W
Deanna Troi No Rule Group Day/Night - Night	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W	W
Geordi La Forge No Rule Group Day/Night - Day	T	T	T	T	T	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O
Jean-Luc Picard No Rule Group Day/Night - Night	T	T	T	T	T	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O
Lieutenant Worf No Rule Group Day/Night - Day	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R

Reports and Dashboards

We made the following changes to our reports and dashboards in this release. These changes may also affect report data linked to systems outside of Helm CONNECT, such as Power BI. 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.

Bank Totals data source now includes opening and closing balances

In this release, we updated the Bank Totals data source so you can now see opening and closing balances in your reports. We also made the following changes to improve the level of payroll detail available in your reports:

- We added a new Bank Record category containing the following new fields:
 - Accruals Quantity
 - Accruals Total
 - Withdrawals Quantity
 - Withdrawals Total
 - Opening Quantity
 - Opening Balance
 - Closing Quantity
 - Closing Balance
 - Net Quantity
 - Net Total
 - Rate
 - Factor

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- The new Bank Record category also contains the following new sub categories (each of which contain Accounting Code, Archived, Created, and Modified fields):
 - Earning Code
 - Payroll Class
 - Payroll Period
- We removed the Archived, Created, and Modified fields because they weren't necessary to the report.
- We streamlined the filters by removing the Payroll Group filter and changing the Payroll Period filter so that you now select only one payroll period at a time.

Documentation for the MC Dashboard now on Helm U

For those of you who subscribe to the Helm CONNECT Dashboard for Maintenance and Compliance (MC Dashboard), you can now view details about each dashboard page on our support site, Helm U (helmu.ca).

Helm CONNECT API

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

New endpoints

We added the following new endpoints:

- Form Templates
- Inspection Templates
- Inventory Templates
- Maintenance Templates

New fields for existing endpoints

We added new fields to the following endpoints:

- Update Order
- Create Or Update Job Event

Use Update Requisition and Update Line Item endpoints to update UDF fields

You can now use the Update Requisition and Update Line Item endpoints to update UDF fields.