



Release Notes

Version 1.22

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 confirmation messages for deleting fleet entries

We improved the confirmation messages that display when you delete a fleet entry from Setup > Fleet. We made them more consistent with similar messages elsewhere in Helm CONNECT and if the fleet entry has a status other than "Uninstalled" or "Ready for Installation," the message now warns you that deleting it will prevent you from transferring data. It also explains that you'll have to reinstall it if you want to resume using it.

Helm CONNECT Maintenance and Compliance

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

Email notifications for notes on tasks

When you add new notes on either the Schedule and Notes tabs in the Update Task window, a new Notify field allows you to send an email notification about that note to the selected users.

Update Task

Task * Parts Used Schedule * Notes * More

Your changes on other tabs will be saved when you post this note and send the notification.

What *

Notify

Posted By *

Clear Post & Notify

Notes

Logs

08/04/2021 16:34 Deanna Troi

Logs



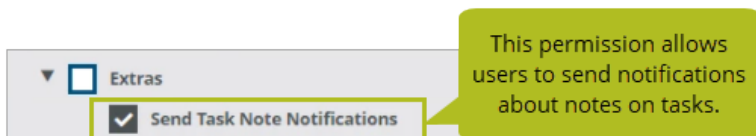
Note The Task Note Notifications feature is available now as a pre-release, which means that it won't be turned on automatically when you upgrade to Version 1.22. Please reach out to your account manager if you have any questions or would like to see a demo.

More about this feature:

- Only active employees with Can Log In selected on their profile will be listed in the Notify field.
- If you have unsaved changes on other tabs in the Update Task window, you'll see a warning that those changes will be saved when you click Post and Notify.
- Anyone whose name was selected in the Assignee field on the Task tab and who has Can Log In selected on their profile will appear automatically in the Notify fields on the Schedule and Notes tabs. If you don't want that user to receive a notification, you must manually remove their name from the Notify field.
- You can't notify someone about a note from the Add Task window. You must first create and save the task, then open it in the Update Task window to have the option to notify someone.

New permission for task note notifications

On the Setup > Users > Roles tab, we added a new Send Task Note Notifications permission to the Extras group. Users with this permission added to their role will see the Notification field on the Schedule and Notes tabs in the Update Task window and send notifications about notes.



Note The Task Note Notifications feature is available now as a pre-release, which means that the Send Task Note Notifications permission won't be added to your tenant automatically when you upgrade to Version 1.22. Please reach out to your account manager if you have any questions or would like to see a demo.

Separate field configuration and custom fields for tasks and corrective actions

Previously, any changes you made to your task fields would also impact your corrective action fields and vice versa. The same was true for custom fields: if you added a custom field to one, it would also appear on the other. Now, we've separated field configuration and custom fields for tasks and corrective actions so you can make a change to one without impacting the other and can have different custom fields on your tasks and corrective actions.

We removed the Setup > Tasks > Task Custom Fields and Task Fields Configuration tabs. We replaced them with two new tabs: Setup > Field Configurations > Tasks and Setup > Field Configurations > Corrective Actions. These tabs are now where you'll configure which of the task or corrective action stock fields you want to show or hide and which ones you want to make required. They're also where you'll add custom fields for your tasks and corrective actions.

The screenshot displays the 'Tasks' configuration interface. At the top, there are tabs for 'Assets', 'People', 'Tasks', and 'Corrective Actions'. The 'Tasks' tab is selected. A yellow callout box states: 'The Tasks tab allows you to configure the stock fields for your tasks. It also allows you to add and modify custom fields for your tasks.'

Below the tabs, the 'Tasks' section contains a table with the following fields and their configurations:

Field	Configuration	Required
Tags	Show	<input type="radio"/>
Component	Show	<input type="radio"/>
Location	Show	<input type="radio"/>
Task Type	Show	<input type="radio"/>
Source	Show	<input type="radio"/>

Below the 'Tasks' section is the 'Custom Fields' section. It features a list of field types on the left: Text, Number, Date, Date & Time, Select Box, Multi Select Box, and Check Box. The main area shows three custom fields:

- Man Hours Rqd.**: Type 'Number', Required ☐. A yellow callout box points to the 'X' icon: 'Click this icon to remove the custom field.'
- PO#**: Type 'Number', Required ☒. A yellow callout box points to the 'Required' radio button: 'Click this icon to make the custom field required.'
- Check box**: Type 'Check Box', Required ☐. A yellow callout box points to the 'Move' icon (three dots): 'Click this icon to drag this custom field to a different position in the list.'

If you have task/corrective action custom fields in Version 1.21, when you upgrade to Version 1.22, you'll see a copy of that custom field on both the Tasks and Corrective Actions tabs. You can keep both copies or modify or delete one of them. The same will be true for any configurations you've made to your stock fields. When you upgrade, the configurations will appear on both tabs, and you can decide whether or not to make any changes.



Tip You can quickly see a list of all your task and corrective action custom fields on the Setup > Operations > Custom Fields tab.

New permissions for task and corrective action field configuration

On the Setup > Users > Roles tab, we removed the Setup > Tasks > Task Custom Fields and Setup > Tasks > Task Fields Configurations permissions, and replaced them with two new permissions: Setup > Field Configurations > Tasks and Setup > Field Configurations > Corrective Actions.

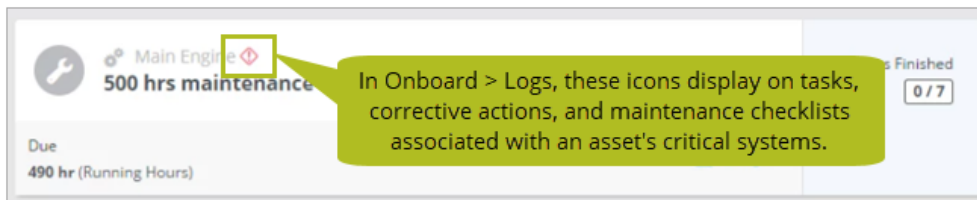


If your company subscribes to both Helm CONNECT Maintenance and Compliance, any users who previously had either the Setup > Tasks > Task Custom Fields or Setup > Tasks > Task Fields Configurations permission will automatically have both of the new permissions after the upgrade. If your company subscribes to only Maintenance or Compliance, those users will only have the corresponding permission.

Critical system indicators in Onboard > Logs

In Onboard > Logs, we now display red critical system icons on tasks, corrective actions, and maintenance checklists associated with an asset's critical systems. You'll see these icons in the following places:

- **In the To-Do list:** On cards for in-progress tasks, corrective actions, and maintenance checklists
- **In the Log:** On completed tasks, corrective actions, and maintenance checklists
- **In the Task and Corrective Actions window:** Below the Component field when a critical system is selected and beside the names of any components that are critical systems in the Component list



Consistent calendars throughout Maintenance and Compliance

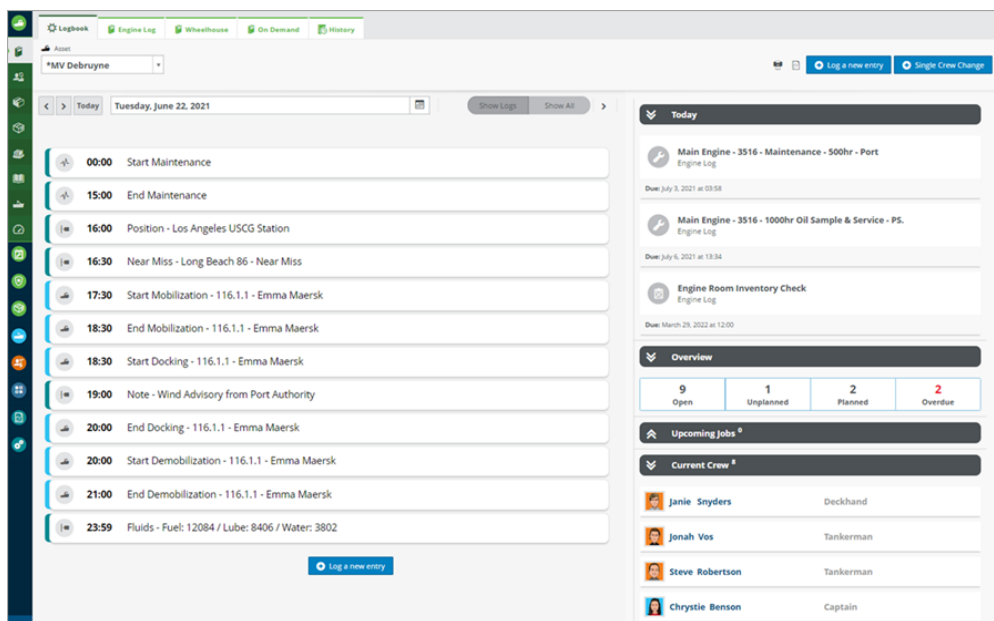
Previously, we used a variety of calendar styles throughout Maintenance and Compliance. In this release, we made sure that most calendars use the more user-friendly style that allows you to quickly select the year and month from a list.

Helm CONNECT Jobs

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

Introducing Logbook

Our new Logbook module is here! This exciting new module—which integrates maintenance, compliance, and personnel into operations and greatly expands the way Helm CONNECT is used onboard—paves the way for our barge maintenance and barge dispatch modules down the road. Please reach out to your account manager for more information or to book a demo.



Planned job dates/times are now displayed on the Trips tab

Previously, the Jobs > Dispatch > Trips tab only displayed actual job dates and times in the Job Start Date, Job Start Time, Job End Date, and Job End Time columns. If only planned dates and times were available, these columns would be blank. Now, if actual times aren't available, these columns will display the planned dates and times.

New External note type

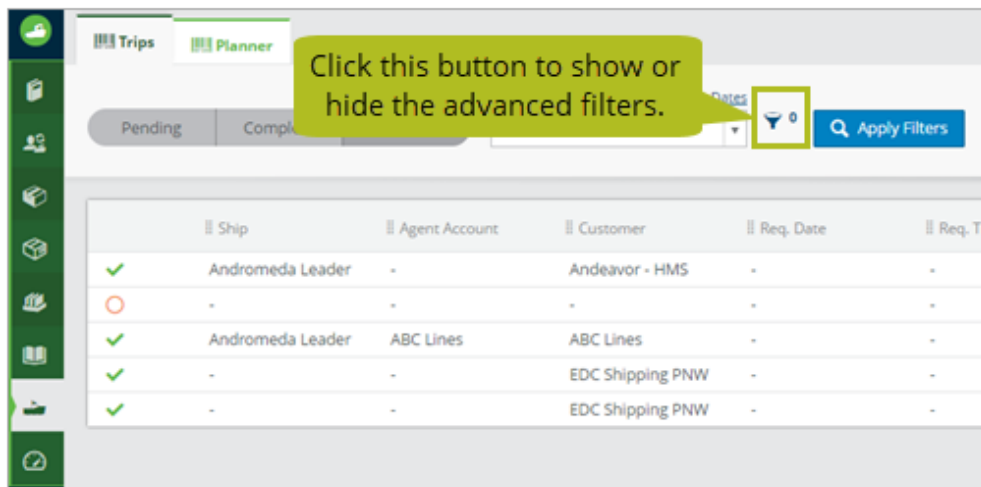
In addition to Billing, Crew, and Dispatch notes, you can now add External notes as well.

New Apply Filters button on the Transactions tab

On the Jobs > Billing > Transactions tab, we added an Apply Filters button for improved performance and consistency with other areas of Helm CONNECT. We also 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.

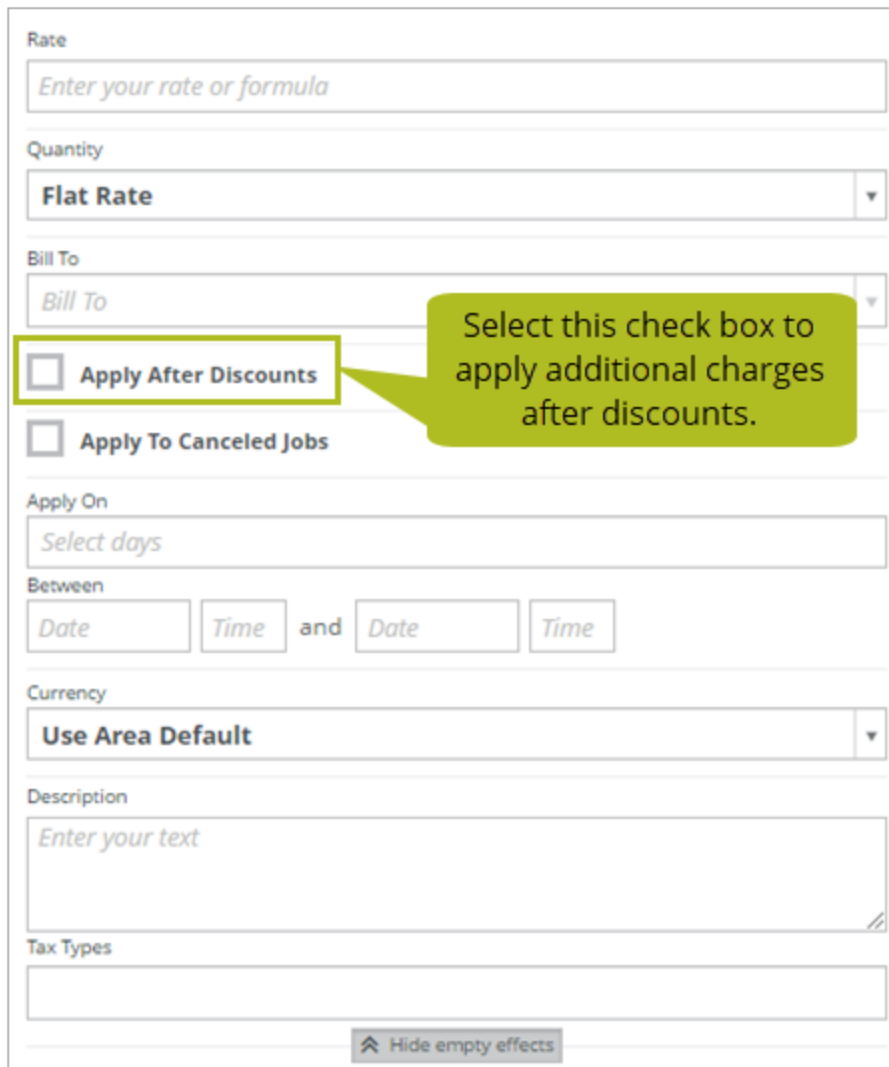
New Toggle Advanced Filters button on the onboard Trips tab

On the Onboard > Jobs > Trips tab, we added a new Toggle Advanced Filters button in the header that allows you to show or hide the advanced filters.



Apply additional charges after discounts

Previously, additional charges were always applied before discounts. In this release, we added a new Apply After Discounts check box for contracts and tariffs to give you the option to apply additional charges after discounts.



The image shows a screenshot of a web form with several input fields. A yellow callout box points to the 'Apply After Discounts' checkbox, which is currently unchecked. The callout text reads: 'Select this check box to apply additional charges after discounts.'

Rate

Quantity

Bill To

☐ Apply After Discounts

☐ Apply To Canceled Jobs

Apply On

Between
 and

Currency

Description

Tax Types

Helm CONNECT Personnel

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

Speed improvements for payroll

This release includes speed improvements that, for many of you, will result in faster payroll generation.

Work Rest - Customize your work-rest types

You can now customize the settings for your work-rest types as well as the Non-Compliant filter:

- **Sort order:** You can click and drag the work-rest types in the list to change the order in which they appear in the legend above the grid.
- **Enabled:** You can toggle the Enabled checkbox on or off to show or hide a particular work type in the legend above the grid.
- **Description:** These are the labels that display in the header above the grid. You can change the default descriptions from Working, Resting, On Watch, and Traveling to terms that better suit your company.
- **Rest:** The Rest checkbox indicates which one of your work types represents rest for your crew; one work-rest type must always be set to rest. Once this setting has been saved, it can't be changed.
- **Tooltip:** You can change the wording in the tooltip that appears if you hover over a work-rest type in the legend above the grid.
- **Shortcut:** You can change which letter represents each work type on the grid. When you select one or more cells in the grid, you can also press that letter on your keyboard to apply the work type to your selection.
- **Format:** You can change the format of the shortcut letter (bold, italicized, or underlined.)
- **Color:** You can change the colors that represent each work-rest type in the grid.
- **Add:** You can add new work types or delete existing ones as long as you don't have more than four in total.



Note Changes to these settings will apply only to new data entered on the grid; they won't apply to any data that was entered prior to the changes.

Enabled	Description	Rest	Tooltip	Shortcut	Format	Sample
<input checked="" type="checkbox"/>	Resting	<input checked="" type="checkbox"/>	Resting	R	B I U W	
<input checked="" type="checkbox"/>	Working	<input type="checkbox"/>	Working	W	B I U W	
<input checked="" type="checkbox"/>	On Watch	<input type="checkbox"/>	On Watch	O	B I U W	
<input checked="" type="checkbox"/>	Traveling	<input type="checkbox"/>	Traveling	T	B I U W	

Work Rest - Enable all the STCW rules with a single checkbox

Previously, if you wanted your crew to follow the Standards of Training, Certification, and Watchkeeping (STCW) rules, you could build a set of work-rest rules to replicate most STCW requirements. Now, a new checkbox called Enable STCW Rules allows you to quickly apply all the STCW rules without having to set them up yourself.

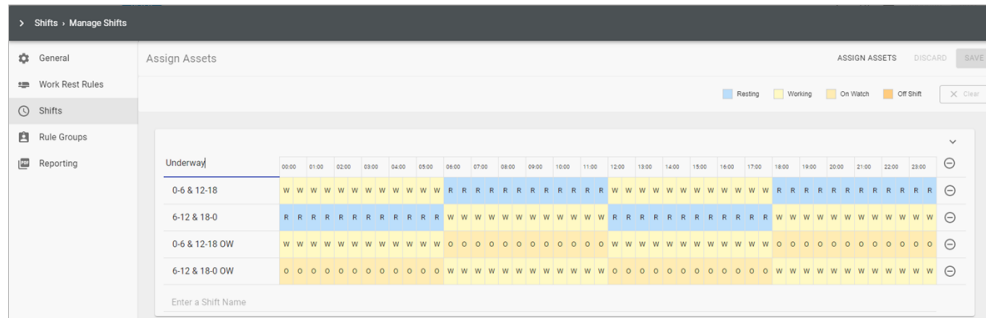
☐ Enable STCW Rules

Standard Rules

- Minimum of 10 hours rest in any 24 hour period in a maximum of 2 blocks of continuous rest with one being at least 6 hours
- Minimum 77 hours of rest in any 7 day period
- Maximum 14 hours between consecutive periods of rest

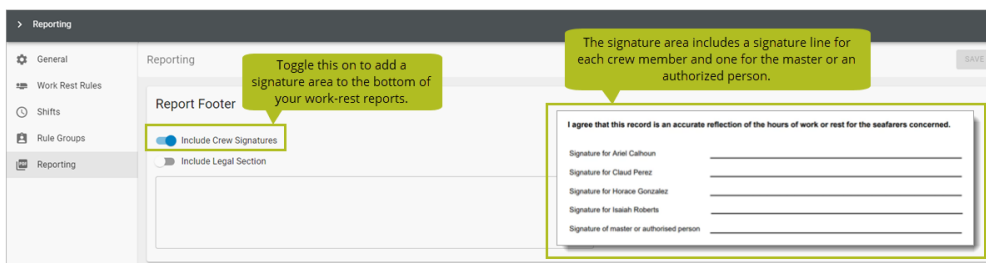
Work Rest - Easier configuration for shifts

To make it easier to configure shifts, setting shifts up is now very similar to adding work-rest time to the grid.



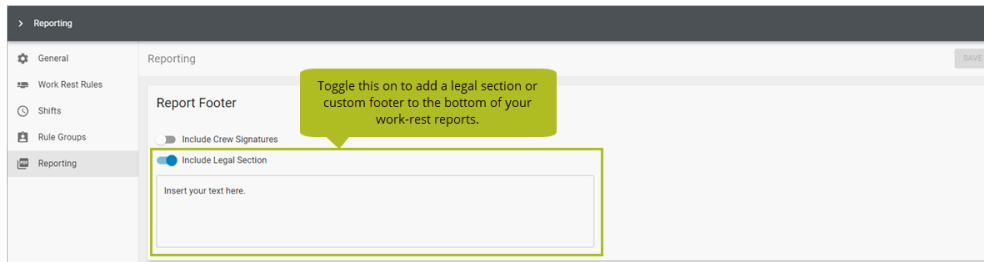
Work Rest - Add a signature area to the report

You can now add an area for crew signatures to the bottom of your work-rest reports. The signature area includes a signature line for each crew member, and one for the master or an authorized person.



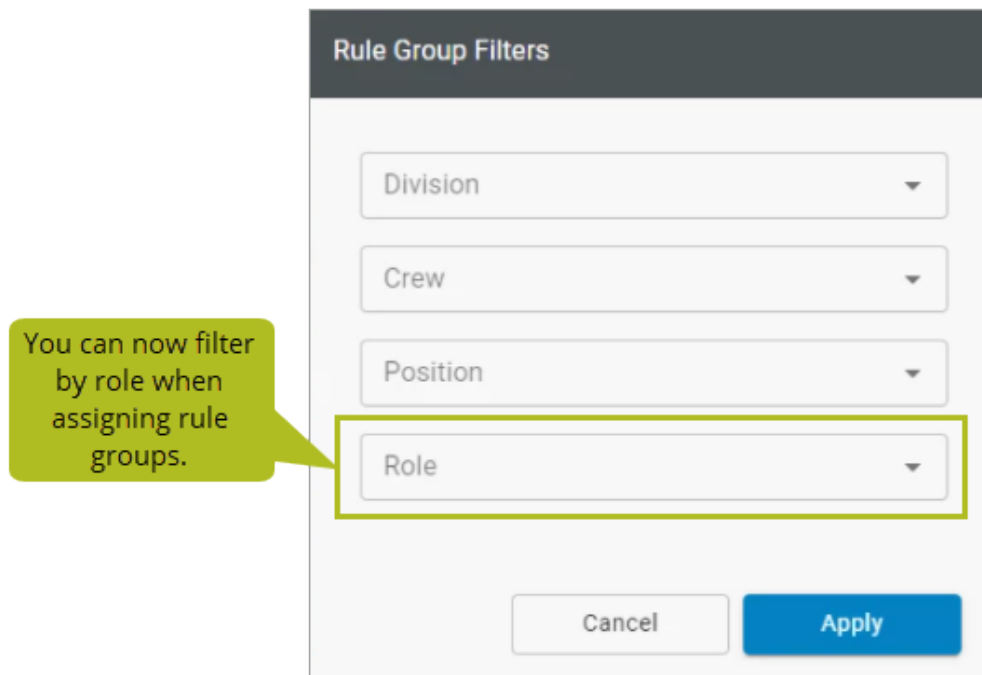
Work Rest - Add a legal section or custom footer to the report

You can now add a legal section or custom footer to the bottom of your work-rest reports.



Work Rest - Filter by role when assigning rule groups

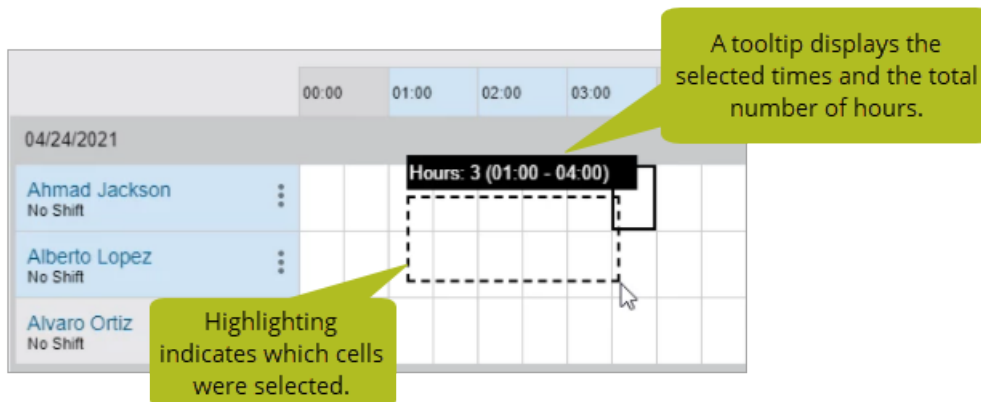
Previously, when assigning rule groups, you could only filter by division, crew, and position. Now, you can also filter by role.



Work Rest - Visual indicators on the grid

We added the following visual indicators to make it easier to see what you've selected on the grid:

- Highlighting to clearly indicate which cells you selected.
- A tooltip to display the times you selected and the total number of hours.
- A summary of the selected cells



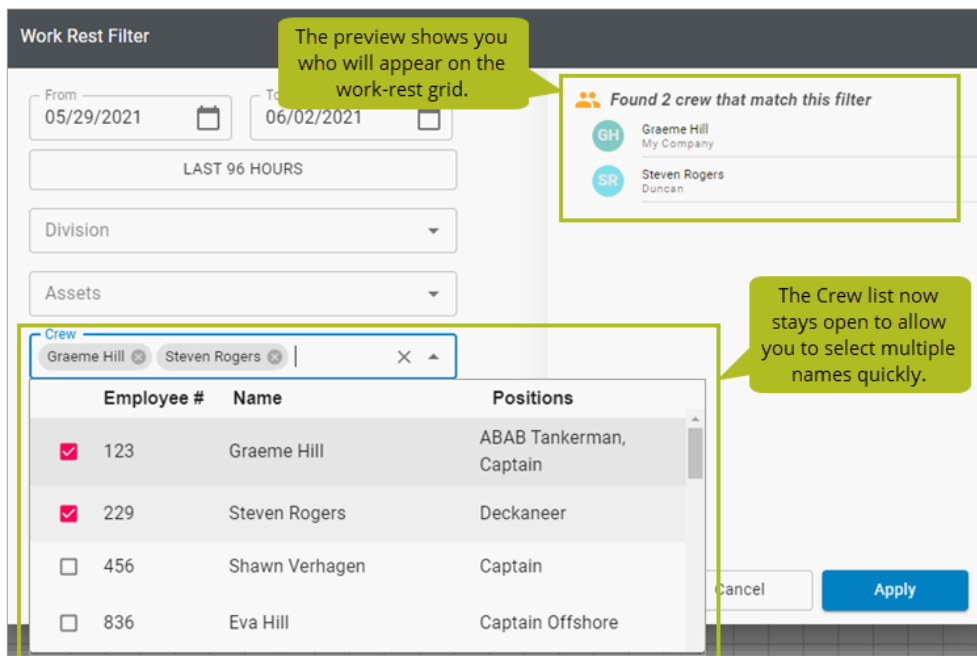
Work Rest - Excel report summarizes hours worked by crew

We added a new Crew Work Summary tab to the Excel report that uses a pivot table to summarize the number of hours worked by crew on each day.

Work Rest - Improvements to the Work Rest filter

We made the following improvements to the Work Rest filter:

- A new preview shows you a list of the crew who will appear on the grid once you click Apply.
- The Crew list now stays open to allow you to select multiple names quickly.



Work Rest - User interface available in Spanish and Portuguese

The Work Rest module is now available in Spanish and Portuguese. When you select a culture for the Helm CONNECT user interface (en-US, es, or pt-BR) on someone's user profile on the Setup > Users > Users tab, your selection will apply to the Work Rest module as well.

Work Rest - Issues addressed

We addressed the following issues in the Work Rest module:

- When adding a note, the "Posted By" list no longer appears to contain only one person.
- When setting up rule groups, deleted and non-active crew no longer appear in the Crew list.
- When you click off the Work Rest Filter window, it no longer disappears.

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.

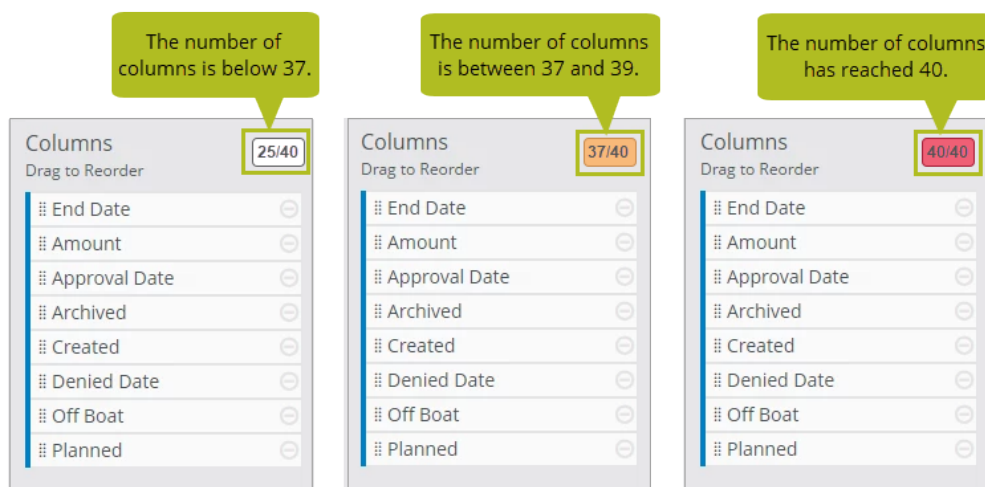
366-day limit on date ranges no longer applies

Previously, the date range filters in our reports had a limit of 366 days, which meant that you couldn't pull more than a year's worth of data into one report. We removed this limit and now allow you to select any date range for your reports.

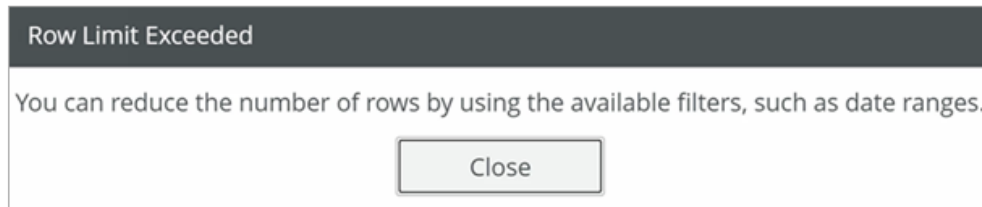
New limit on the number of columns and rows in a report

To make reports faster and more stable, we're imposing the following limits on the number of columns and rows that you can add to each report:

- **Column limits:** Reports will be limited to 40 columns. As soon as you open a new or existing report, it will be easy to see the number of columns in your current report and whether you're approaching the limit. As soon as you reach 40 columns, you'll be prevented from adding any additional columns.

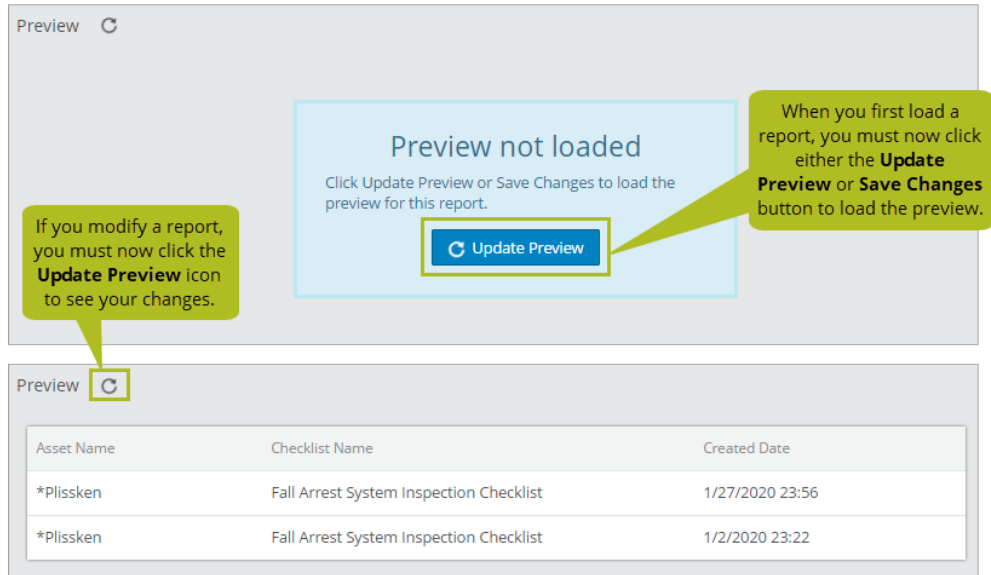


- **Row limits:** Most reports will be limited to 100,000 rows; however, these reports will have a higher limit of 200,000 rows: Parts, Parts History, Part Quantities, Vendor Part Prices, Forms, all the Checklists reports, and all the Templates reports. If you try to export the report as a PDF or a CSV, you'll see a warning that you've exceeded the maximum number of rows and must use the available filters to reduce the amount of data in your report.



Changed behavior for the report preview

Previously, the preview would load automatically as soon as you selected a data source. If you made any changes, such as adding or removing columns or modifying the filters, you'd see those changes immediately. Now, you must click the new Update Preview button to load the preview manually and, each time you make any changes, you must click the new Update Preview icon to see the changes in the preview.



Note Reports with either default columns or fixed columns won't require you to click the Update Preview button when you first load them. In addition, we didn't change the number of rows displayed in the previews; they still display only the first 25 rows of a report.

Audits data source now includes details about corrective actions

We added a new Findings > Corrective Actions group to the available fields in the Audits data source so that you can report on the corrective actions from specific audits.

New Logbook data source

We added a new Logbook data source that allows you to report on both activities and events. One nice touch is that activities are now displayed on one line, instead of on two lines as they are in the Event Logs data source.

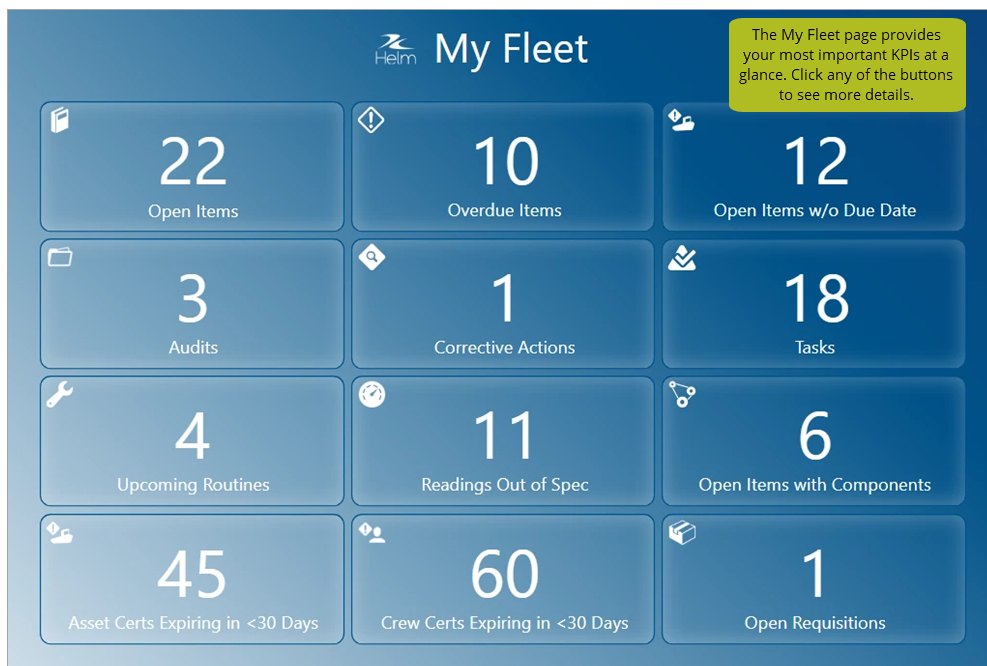
Performance improvements for the Maintenance Checklists data source

To improve performance for customers with large numbers of maintenance templates, we changed the behavior of the Maintenance Templates filter in the Maintenance Checklists data source. Now, the filter will only display the first 50 templates by default and you must search for additional templates by entering their names in the field.

Changes to the MC Dashboard

We made the following changes to the Helm CONNECT Dashboard for Maintenance and Compliance (MC Dashboard) in this release:

- Added a new page called My Fleet that provides an overview of the other pages in the dashboard, and allows you to click through to the other pages to see more details.



- Added a new page called Engineering - Fleet Overview that tracks the hours-based performance of the components for all the assets in your fleet.
- Added a new page called Readings that looks at the readings for all the assets in your fleet, including reading trends over time and any out-of-spec readings.

- Added a new page called Passenger Vessels that summarizes your ridership information, including how many people are riding each route, which routes are the busiest, and which times of day see the highest passenger counts.
- Combined the Drill Matrix - By Asset and Drill Matrix - By Crew pages into one page called Drill Matrix that allows you to toggle the displayed data between your assets and your crew.
- Combined the Asset Certifications and Crew Certifications pages into one page called Certifications that allows you to toggle the displayed data between your assets and your crew.
- Improved the appearance of the dashboard with changes such as square edges and dropped shadows on the slicers.

Changes to the Jobs Dashboard

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

- Renamed the Operations page to Jobs.
- Added a new page called Port Calls that tracks ships coming into the port, provides metrics about your top customers within the last 30 days, and helps you optimize the location of your assets within the port to reduce overhead.
- Added a new Revenue Breakdown page that breaks revenue down by port, trip type, and asset, as well as by the different fees on the order form, such as base rate or fuel.

Helm CONNECT API

We made the following changes to the Helm CONNECT API in this release. For more details, please refer to our API documentation (api.helmconnect.com).

Changes to existing endpoints

We made changes to the following endpoints:

- **Component:** Updated the endpoint to display the VesselComponentID.
- **CreateOrder** and **UpdateOrder:** Updated the endpoints to require a division and area and added validation. Also added order notes.
- **CreateOrUpdateShip:** Updated the endpoint so it returns the ID of the ship that's been created or updated.
- **FindJobs:** Updated the endpoint to include Added TripStatus, AssignedResourceID, and From/To Date filters.
- **FindOrders:** Updated the endpoint to include the archived date in the returned data model, added a filter to include archived orders, added a new ModifiedDate field, and added order notes.
- **SetPosted:** Added an UpdatePDF flag that allows a PDF to be updated to include any recent changes to a transaction.