Release Notes

Version 1.23

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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.

Filter changes on the Assets tab

We made the following changes to the filters on the Management > Assets > Assets tab:

- Replaced the Assets filter with a search box called Name that allows you to search for one or more assets by name or part of a name.
- Added an Apply Filters button. Now, after selecting the filters you want to use, you must click the Apply Filters button or press Enter to apply them.

Filter changes on the People tab

We made the following changes to the filters on the Management > People > People tab:

- Replaced the People filter with a search box called Name that allows you to search for one or more people by name or part of a name.
- Added two new search boxes: Employee Number and Position
- Added an Apply Filters button. Now, after selecting the filters you want to use, you must click the Apply Filters button or press Enter to apply them.

Employee number displayed on cards on the People tab

We now display each person's employee number in the top right corner of their card on the Managment > People > People tab. If a person doesn't have an employee number on their profile, that area of the card will be empty.

Helm CONNECT Maintenance and Compliance

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

Improved workflow for adding part tracking

Maintenance customers who also subscribe to the Inventory module will notice the following improvements to the workflow for adding part tracking:

- **New Add Part Tracking section**: We replaced the Add Part Tracking window with an Add Part Tracking section. On the Onboard > Inventory > Parts and Inventory > Inventory > Parts tabs, when you click Edit, you will no longer click Add Part Tracking to display the Add Part Tracking window. Instead, you will complete the Asset and Part fields in the new Add Part Tracking section, then click Add Part Tracking to start tracking the part.

- **New Tracked Parts section**: All tracked parts are now listed in a new Tracked Parts section, directly under the Add Part Tracking section.

- **New locations for the Recorded by field and Save button**: Previously, the Recorded by and Save buttons were located directly above the list of tracked parts. We renamed the Save button to Save Changes and moved it to the upper right corner of the tab. Now, when you finish adding part tracking, click Save Changes to display the Save window, then complete the Recorded by field and click Save.
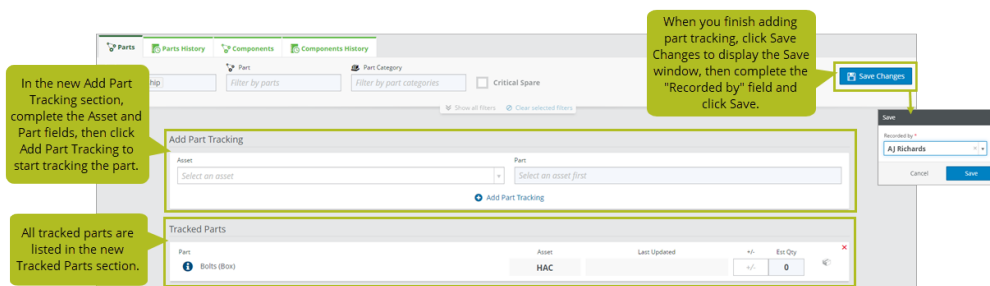
Request manager for parts

For our Maintenance customers, we introduced a new request manager for parts. Users can request the parts they need in order to complete their work without interruption, but those parts won't be added to your company's master parts list until they've been reviewed and approved.

Users can request parts while adding or editing line items in requisitions. The status of a line item can't be set to Received on Shore, Received on Asset, Closed, or Canceled unless a requested part has been approved. Similarly, the status of a requisition can't be set to Received on Shore, Received on Asset, Closed, or Canceled unless all part requests have been addressed.
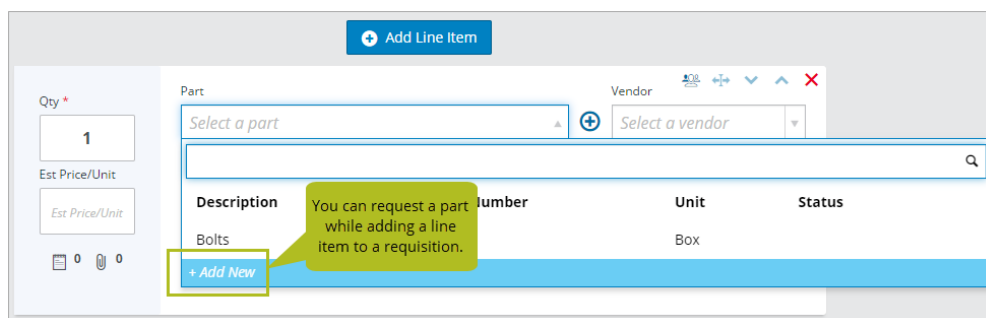
If your company subscribes to the Inventory module, users can also request parts while performing the following workflows:

- While recording the parts used on a task. The requested part must be approved before the task can be finished.
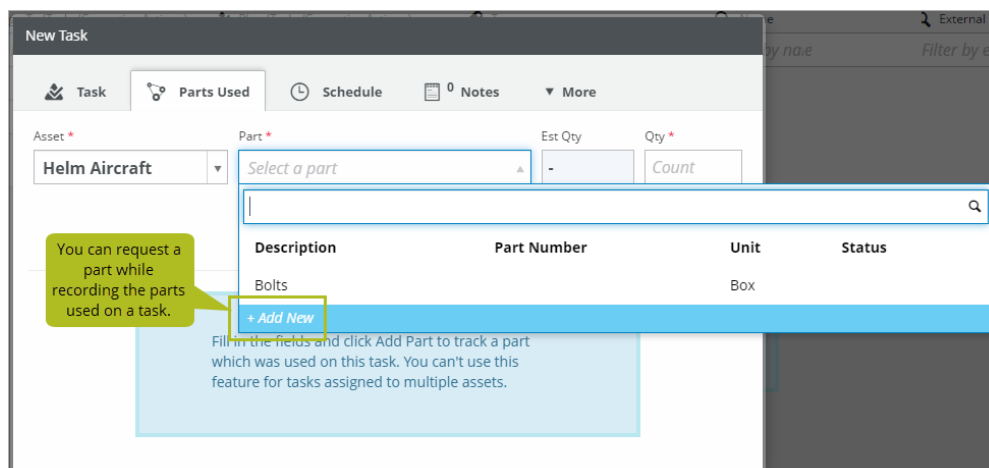
- While adding part tracking from the Onboard > Inventory > Parts and Inventory > Inventory > Parts tabs. You can't update the inventory of a declined part.
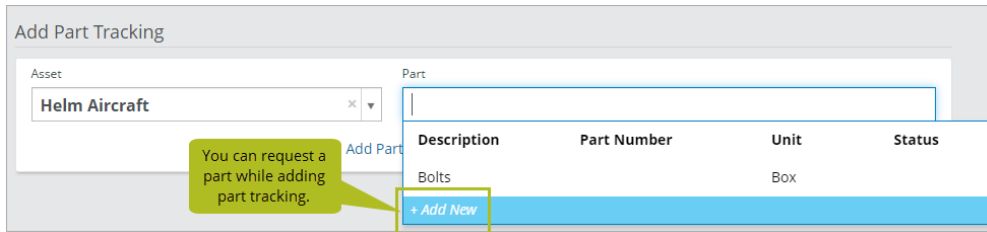
Permissions to request parts and approve part requests

We added a new permission to the Setup > Request Manager > Request group to control which users can request that parts be added. We also added a new shore-only permission to the Setup > Request Manager > Approve group to control which users can approve requests to add parts.
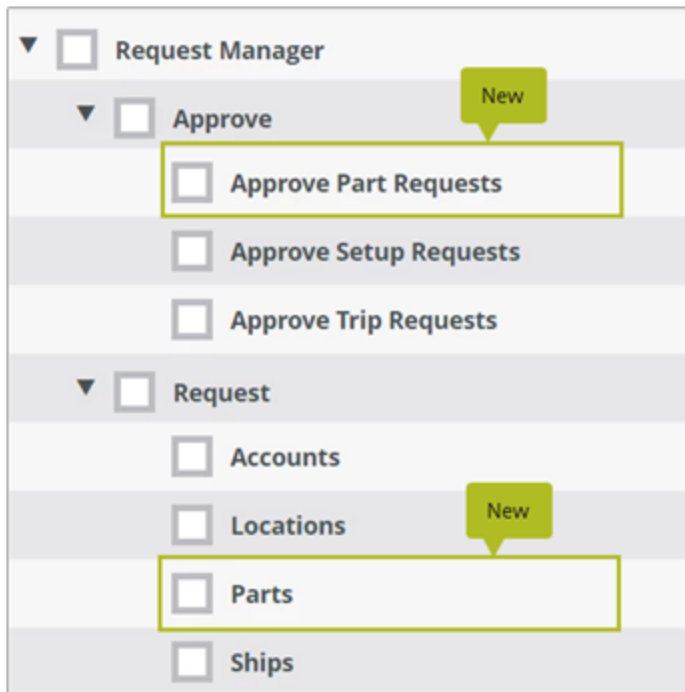
These permissions will be off by default after the update to Version 1.23. If you want specific users to have the new permissions, you must add them to their roles.

Permission to add new parts directly to requisitions

We added a new permission to control which users can add new parts directly to requisitions without having to make a request.
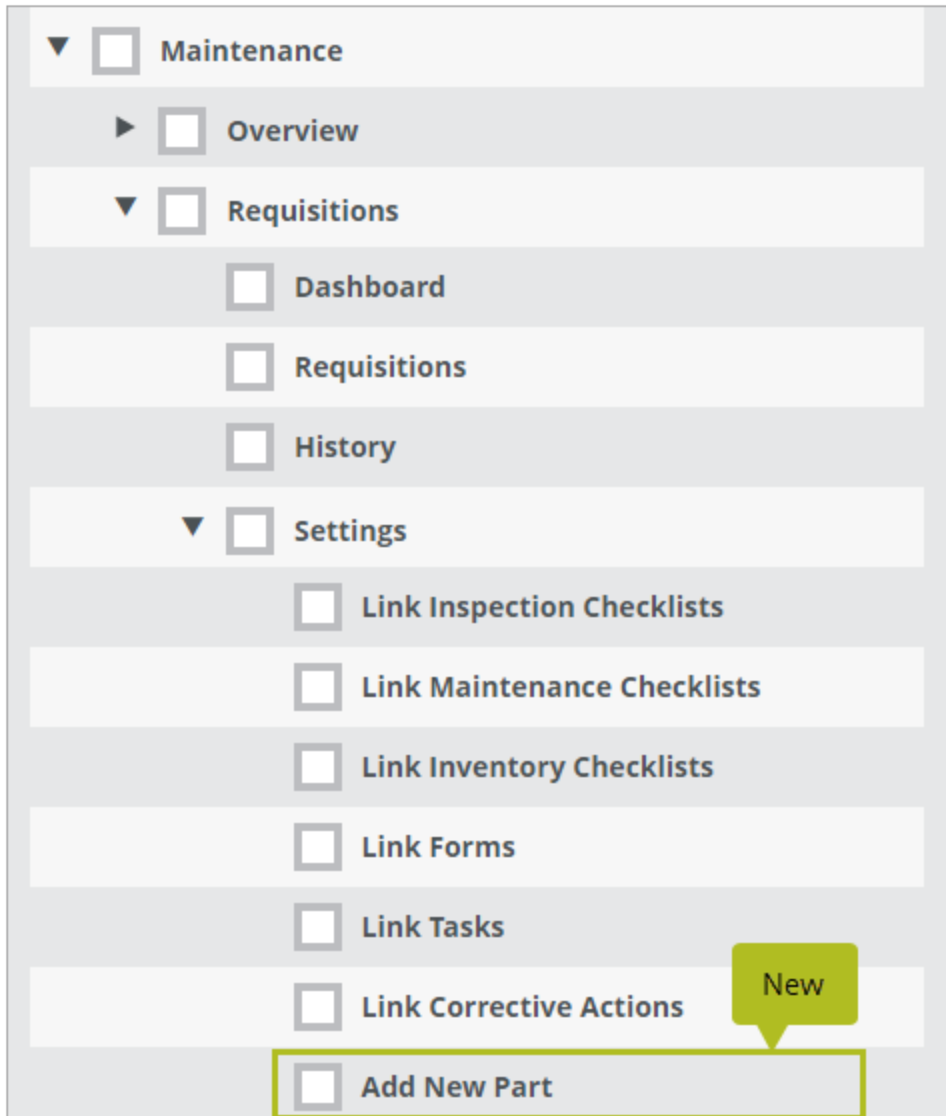
To ensure that anyone who previously had the ability to add a part to a requisition continues to do so, after the update to Version 1.23, the new permission will be on by default for users who had at least one of the following permissions:

- Onboard > Requisitions
- Maintenance
- Maintenance > Requisitions
- Maintenance > Requisitions > Requisitions
- Setup > Templates > Requisitions

Permissions to transfer parts or components

We added two new permissions to the Inventory > Settings group to control which users can transfer parts and components.
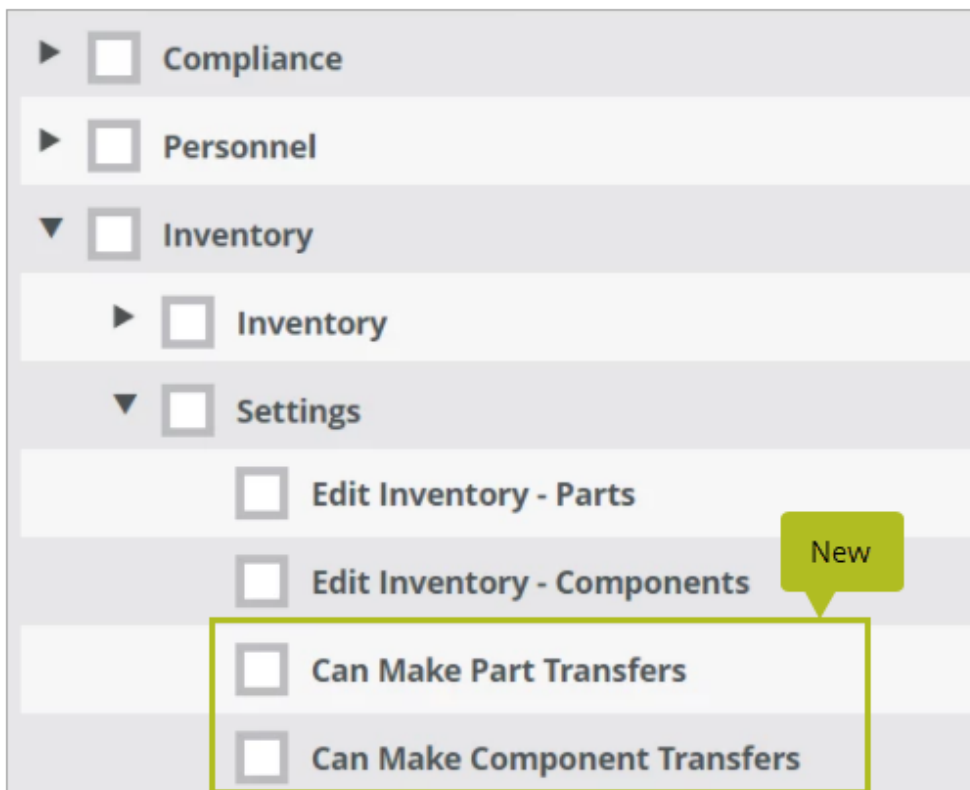
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Users now require the Edit Inventory - Parts and the Can Make Part Transfers permission to transfer parts. To transfer components, they require the Edit Inventory - Components and the Can Make Component Transfers permission.

These permissions will be on by default after the update to Version 1.23 for users who previously had the Edit Inventory - Parts and the Edit Inventory - Components permission. If you don't want specific users to have the new permissions, you must remove them from their roles.

Better indication on checklists and forms that progress will be saved

We changed the tooltip wording on the little blue arrow at the top left of checklists and forms from "Finish Later" to "Save Changes." We hope this small change will reassure users that clicking the button will save their progress on a checklist or form and they can safely return to finish it later.
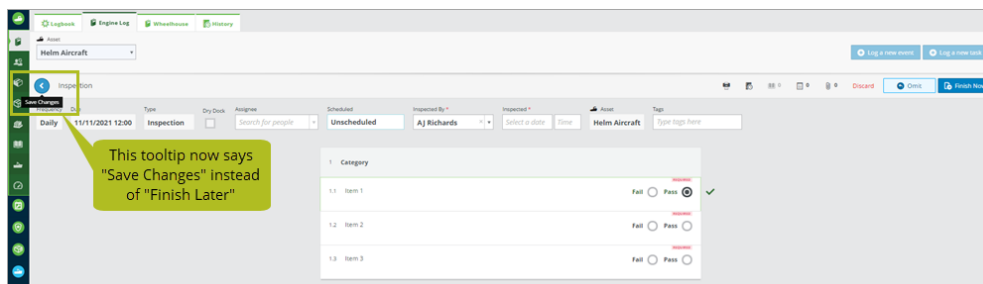
Failed items in form approval categories can generate tasks

You now have the option to generate a task from a Fail|Pass or No|Yes|N/A item placed within an approval category on a form template. If the Generate Task icon is toggled on for the item, anyone who selects Fail or No when filling out forms based on that template will now be prompted to create a task, although those tasks won't be published until the form is approved:

- If the form is approved, tasks created within the approval category will be published.

- If the form is declined and sent back to the previous step, tasks created within the approval category won't be published until the form is approved.

- If the form is declined, tasks created within the approval category will be deleted. On the History tab, the deleted tasks will appear with strikethrough on the form's detail page.

Select specific due times for tasks and corrective actions

Previously, you could only select the date when tasks or corrective actions were due or when tasks were scheduled, but the system would automatically set the the time to 23:59 on the selected date. In addition, the dates didn't account for timezones, which meant that they stayed the same regardless of the time zone in which they were viewed.

Now, in addition to the date, you can also select the specific time when you want a task or corrective action to be due or a task to be scheduled. The selected date and time will also be saved in your time zone, which means they will adjust according to the time zone in which they're viewed.

Note Any tasks or corrective actions created prior to Version 1.23 will still be due or scheduled at 23:59 on the selected date and in the time zone in which they were originally created.

Helm CONNECT Jobs

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

Add manual transactions to submitted invoices

You can now add flat rate or percentage-based transactions to an invoice after it has been submitted.
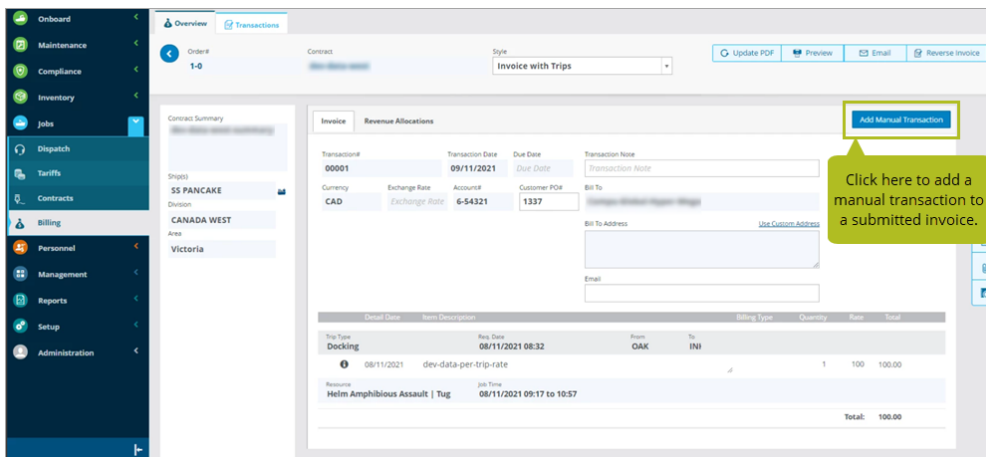
Permission to add manual transactions

We added a new permission to the Jobs > Billing group to control which users can add manual transactions. This permission will be off automatically after the update to Version 1.23. If you want specific users to have this permission you must add it to their roles.

▼ ☐ Jobs
   ▶ ☐ Dispatch
   ▼ ☐ Billing
      ☐ Read
      ☐ Calculate
      ☐ Edit
      ☐ Approve Invoice
      ☐ Submit Invoice
      ☐ Print Final Invoice
      ☐ Reverse Invoice
      ☐ Reverse Related Transaction
      ☐ Unpost Transactions
      ☐ Revenue Allocation
      ☐ Estimates
      ☐ Volume Based Billing
      ☐ Edit Submitted Invoice
      ☐ Tax Types
      ☐ Interval Billing
      ☐ Discard Billing Intervals
      ☐ Allow Early Billing of Intervals
      ☐ Email Transactions
      ☐ Add Manual Transactions

New

Rules that use "between" are now inclusive

Rules that use the "between" condition on tariffs and contracts are now inclusive instead of exclusive. Previously, for example, if a condition used "between 07:00 and 12:00", a trip starting at 07:00 would not have triggered the rule, but now it will.

Jobs remain in edit mode after saving

It's now much easier to update jobs onboard your assets. When you open a job from Onboard > Logbook or Onboard > Logs, you'll notice that we removed the Edit button and that you can immediately start logging activities and entering information. When you click Save, you'll see a notification in the lower right corner of the screen to indicate that your progress was saved, and the job will remain in edit mode so you can keep right on working.

Job numbers displayed more clearly onboard

When you open a job from Onboard > Logbook or Onboard > Logs, you'll now see the job number in the header, to the left of the ship name.

Option to exclude empty dates on the Trips tab

We added a new check box to the Jobs > Dispatch > Trips tab called Include Empty Dates that allows you to include or exclude empty dates from your results when you filter by date. Previously, the results would include all trips in the selected date range and any trips with empty dates. Now, empty dates will be excluded from the results unless you select the Include Empty Dates check box.

More about this feature:

- To see the Include Empty Dates check box in the header, you must first click the Toggle Advanced Filters icon.

- To keep the date filter's behavior consistent, after the upgrade to Version 1.23, the Include Empty Dates check box will be selected (checked) by default. If you'd like to exclude empty dates from your results, you must clear (uncheck) the check box.

- If you clear the Include Empty Dates check box then click the Reset button to reset the advanced filters, the check box will be selected again by default.

Helm CONNECT Personnel

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

Apply Filters button on the Schedule tab

For improved performance and consistency with other areas of Helm CONNECT, we added an Apply Filters button to the Personnel > Schedule > Schedule tab. Now, after selecting the filters you want to use, you must click the Apply Filters button to apply them.

Disable payroll forecasting

Forecasted payroll includes planned, pending, and approved work whereas actual payroll includes only approved work. Previously, Helm CONNECT calculated both forecasted payroll and actual payroll automatically, which was helpful for companies that wanted to estimate their upcoming payroll needs but was an unnecessary use of time and system resources for companies that didn't need this feature because it could double the amount of time needed to process payroll.

In this release, you now have the option to disable payroll forecasting for some or all of your payroll schemes, thereby reducing your payroll processing time by up to 50 percent. On the Setup > Payroll > Payroll Schemes tab, we added a Payroll Forecasting check box to the detail view of each payroll scheme that allows you to enable or disable payroll forecasting for that scheme.
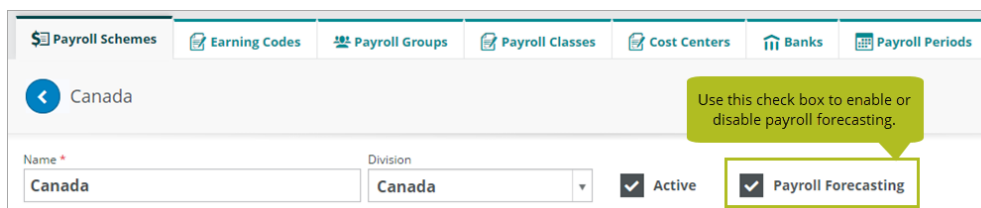
We also added a Payroll Forecasting column to the list view on the Payroll Schemes tab so you can see at a glance which payroll schemes have payroll forecasting enabled.

More about this feature:

- Payroll forecasting significantly increases the time it takes to process payroll because it requires the payroll engine to perform the calculation twice. By disabling payroll forecasting, some customers may be able to reduce their payroll processing time by up to 50 percent.

- If payroll forecasting is enabled or disabled on a parent division, that setting will automatically apply to all child divisions.

- When you upgrade to Version 1.23, the Payroll Forecasting check box will be selected automatically on all your payroll schemes to ensure that you don't experience any difference in behavior between Version 1.23 and 1.22. To disable payroll forecasting for a particular payroll scheme, you must clear this check box manually.

Select multiple crew or crew groups on the Payroll Details tab

We made the following changes to the Person filter on the Personnel > Payroll > Payroll Detail tab:

- Renamed the filter to Crew

- Changed the filter to allow you to select multiple crew members in the filter instead of just one

- Added a Pick Crew Groups toggle that allows you to select one or more crew groups in the filter

Change log indicates if crew change is on or off

On the Personnel > Schedule > Change Log tab, we now indicate clearly whether a crew change is on or off.

Work Rest - Crew can no longer confirm data in the future

Previously, crew could confirm work-rest data for future dates. Now, they can only confirm data for dates up to and including today. A warning will display if they attempt to confirm data for future dates.

Work Rest - Additional custom buttons for work-rest types

Previously, you could have up to four buttons to represent your work-rest types. Now, you can have up to ten buttons.
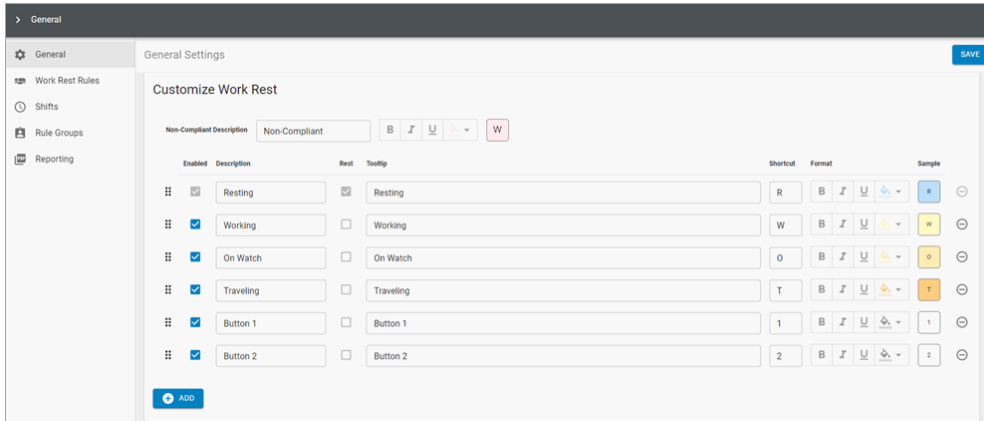
Note If you have more than four buttons, the toolbar above the grid will display the shortcuts for each button instead of their full names.

Work Rest - Paging data no longer occasionally misses the last day

We addressed a rare issue where, when data was displayed in multiple pages, the data for the last day was occasionally not displayed. Now, the data for the last day is always displayed.

# Work Rest - Crew names in Confirm Work Rest window now filtered correctly

We addressed an issue in the Confirm Work Rest window where the list of crew names in the Confirm As field wasn't being filtered. The list is now filtered correctly by the division of the logged-in user.

Work Rest - Notes and Confirm permissions now applied correctly

We addressed an issue where the Notes and Confirm permissions—which control who can comment on or confirm work-rest details—were not being applied. The permissions are now applied correctly.

Permissions for crew changes

On September 7, we released a minor update that added three permissions to the Onboard > Personnel group on the Setup > Users > Roles tab. The new permissions control access to these three features on the Onboard > Personnel > Crew Changes tab: the Current Crew list, the Planned Crew Changes list, and the Single Crew Change button.
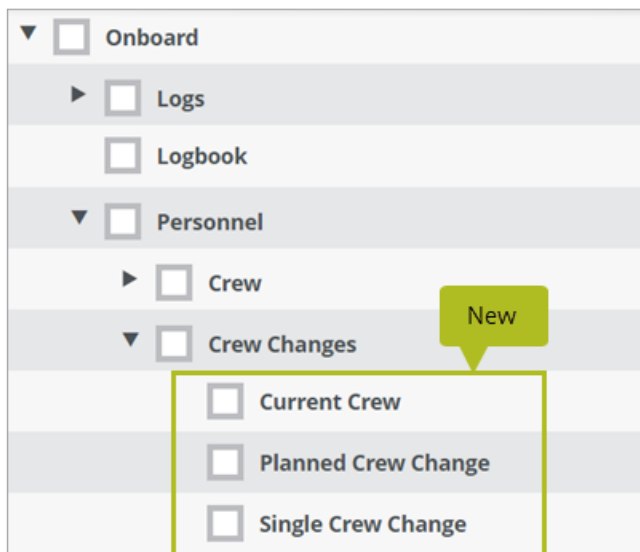
After the update, we turned the new permissions on automatically for users who previously had the Onboard > Personnel > Crew Changes permission. If you don't want specific users to have some or all of these permissions, you must remove them from their role.

Filter earning codes by payroll class

On October 5, we released a minor update that added a new configuration option that allows you to filter earning codes by payroll class. After the update, existing timesheet configurations were set automatically to "No filtering."
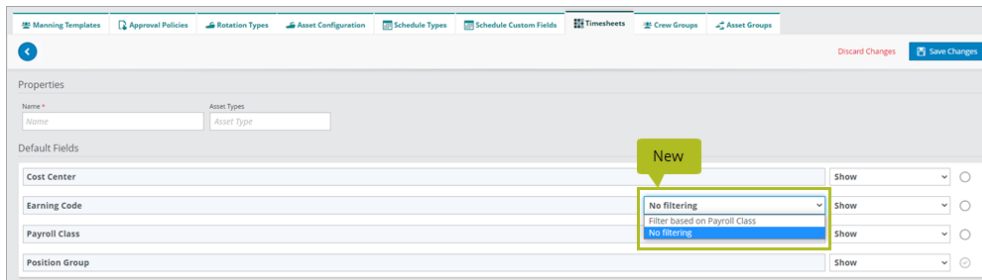
Reports and Dashboards

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.

Crew Change Notifications field added to several data sources

We added a Crew Change Notifications field to the following data sources:

- Bank Records
- Bank Totals
- Crew Changes
- Days Off
- Payroll Transactions
- People
- Work Periods

The new field allows you to report on which crew members have preferences set up for crew change notifications.

Changes to the Jobs Dashboard

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

Competitor Analysis page

We added a new Competitor Analysis page that compares your company's trips to your competitors' trips and determines the potential trips and revenue you could gain by taking customers from your competitors.
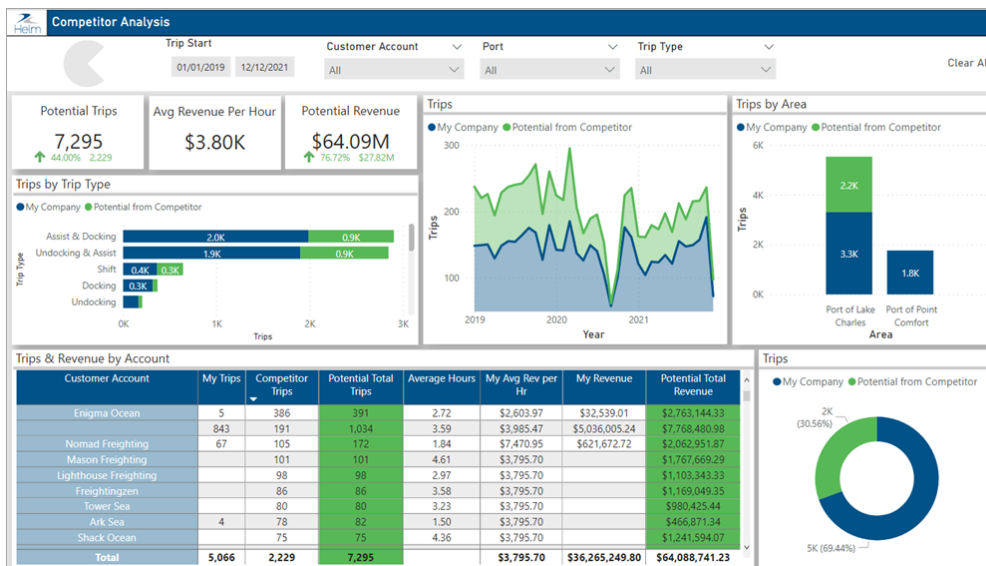
Invoicing page

We added a new Invoicing page that tracks information about customer invoices, including your total number of invoices across all customers and whether those invoices and have been sent out or not. It also tracks the average time to send out an invoice once an order is complete.

Although Helm CONNECT doesn't track which invoices have been paid, we can import this information from most accounting software packages. With the addition of this information, we can also track which customers have outstanding invoices so you can easily see how much of your revenue is outstanding and which customers have a history of unpaid or late invoices.

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📝 **Note** Please reach out to your account manager to learn more about importing this information into Helm CONNECT.


Resource Utilization page

We renamed the existing Resource Utilization page to Hourly Utilization and added new Resource Utilization page that tracks how many days your assets work in a calendar year, and determines the utilization percentage per asset and across your entire fleet. Visualizations help you see whether ship traffic (port calls) led to a decrease in utilization.
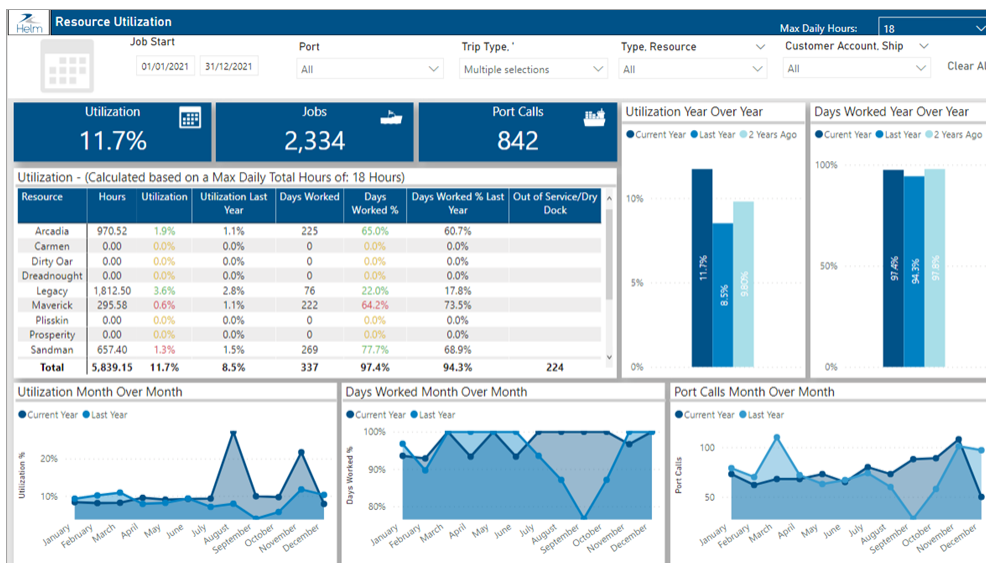
30, 90, 365 slicer

We added a new 30, 90, 365 slicer to the Jobs, Port Calls, and Revenue pages that allows you to toggle the metrics on the page from a Month, Quarter, Year format to a last 30, 90, 365 days format.

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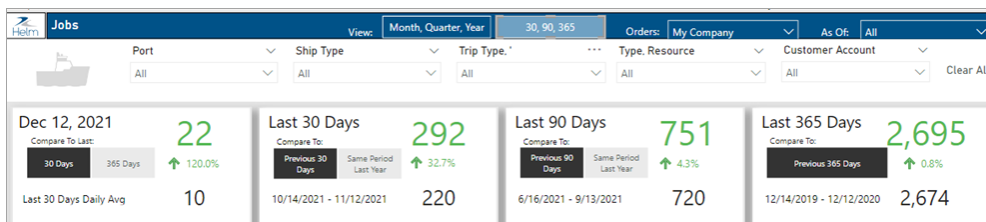
Comparison slicer on revenue gauge charts

We added a slicer to the revenue gauge chart (visualization) on the Revenue page that allows you to compare your revenue for different time periods.

Resource Type slicer

We added a new slicer to all the pages in the Jobs dashboard that allows you to filter the metrics on each page by resource type.

Jobs Last 30 Days

We added a new area chart (visualization) to the Jobs page that displays the last 30 days of jobs by day.

Net Revenue Last 30 Days

We added a new area chart (visualization) to the Revenue page that displays the last 30 days of net revenue by day.

Last 30 Days Growth % columns

We added a new Last 30 Days Growth % column to the tables on the Port Calls and Revenue pages:

- Port Calls table: The new column shows the growth in port calls in the last 30 days over the previous 30 days of port calls.

- Revenue table: The new column shows the last 30 days of growth in revenue over the previous 30 days of revenue.

Orders slicer

We added an Orders slicer to the Jobs and Port Calls pages that allows you filter the metrics on the page either by your company's orders or by competitor orders.

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).

Update revenue allocations through the Transactions endpoint

Revenue allocations can now be updated through the Transactions endpoint.

Changes to the Find Tasks endpoint

We made the following changes to the Find Tasks endpoint:

- It can now be filtered by CreatedDate, ModifiedDate, CompletedDate, DueDate, ScheduledDate, and LastSyncDate.
- We added a new field called ExternalNumber.

Request parts through the CreateOrUpdatePart endpoint

As part of the new request manager for parts feature, we added a new parameter called "asRequest" to the CreateOrUpdatePart endpoint that allows you to add a new part as a request.

Changes to the FindRequisitionLineItems endpoint

We made the following changes to the FindLineItems endpoint:

- API output now includes a ModifiedDate field.
- We added new query string parameters:
    - includeResolved - Set this to true if you want Closed/Canceled/ReceivedOnAsset line items included in the output.
    - fromDate / toDate - Use this to filter by the date the line item was last touched
- In addition to the existing status filter options, you can now filter by "Closed," "Canceled," or "ReceivedOnAsset"