Release Notes

Version 1.24

Copyright and Publication Information

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Contents

Copyright and Publication Information **2**
The Platform **6**
Organize your asset custom fields by group 6
Save time when searching or applying filters on the Locations tab 7
Customize the support link on the Sign In page 8
Customize your personal settings in Helm CONNECT 8
Updated technical requirements for asset installations 9
Deprecation of Windows 7 in Version 1.25 9
Helm CONNECT Maintenance and Compliance **10**
Use titles and labels to identify your forms 10
Send email notifications about notes on corrective actions 11
Control who can send notifications about notes on corrective actions 12
Stop closing the Task and Corrective Action windows by mistake 13
See who made changes on the Requisitions tabs 14
Hide the “Uncontrolled Document” watermark when it’s not needed 15
Control who can hide the “Uncontrolled Document” watermark 15
Save time when applying filters on the Parts tab 16
Customize the detail views on your History tabs 16
Quickly see the approval status of your submitted forms 17
“Task Type” label changed to “Source Type” 17
Helm CONNECT Jobs **18**
Streamline your dispatching process with the Helm CONNECT Portal 18
Use the Bill To Account in contract rules 18
Understand why selected date ranges in Dispatch and Billing are invalid 18

Save time by copying Logbook events 20
Enter longer Logbook descriptions 20
Helm CONNECT Personnel **21**
Payroll: Payroll forecasts now include manual adjustments 21
Work Rest: Configure multiple rest types 21
Work Rest: Change log displays correctly in all situations 21
Work Rest: Filters no longer display too many crew 21
Reports and Dashboards **22**
Individual permission for each report data source 22
New Users data source 23
New Fuel Tables data source 23
Use filters to find your reports quickly 23
Include notes in your reports 24
Convert Dates to Local filter added to Asset Utilization data source 25
Job Count and Requested Resources columns added to Trips and Job Revenue data sources 25
Hide Watermark column added to Documents data source 26
Label Item Number column added to Form Templates data source 26
Title and Label columns added to Forms data source 26
Label change in the Tasks data source 26
MC Dashboard: New Near-Miss page 26
MC Dashboard: New Reliability page 27
Helm CONNECT API **29**
Changes to the “Next” link in some endpoints 29
Create Order (api/v1/jobs/orders/CreateOrder) 29
Find Activities (api/v1/core/activities/FindActivities) 29
Find Divisions (api/v1/jobs/Divisions/FindDivisions) 29

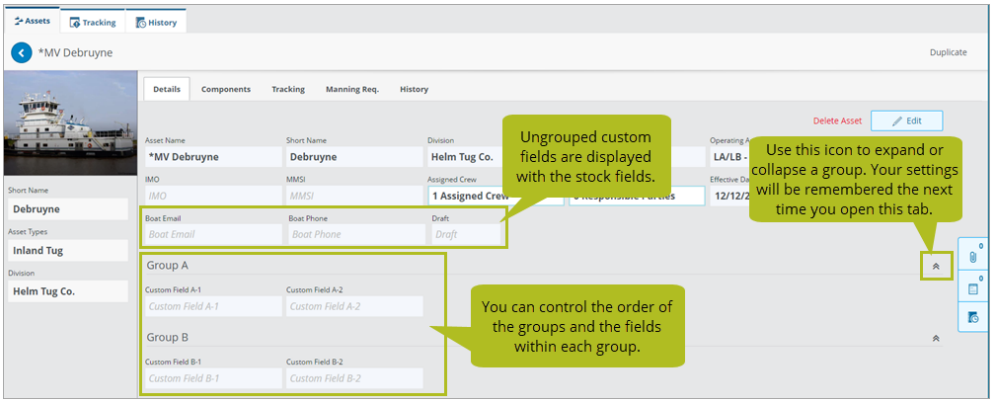
Find Events (api/v1/core/events/FindEvents) 29
Find Job Activities (api/v1/jobs/events/FindJobActivities) 30
Find Job Events (api/v1/jobs/events/FindJobEvents) 30
Find Orders (api/v1/jobs/orders/FindOrders) 30
Find Part (api/v2/public/parts) 31
Find Requests (api/v2/public/requests) 31
Find Trip Events (api/v1/jobs/events/FindTripEvents) 31
Find Users (api/v1/jobs/users/FindUsers) 31
Locations (api/v2/public/locations) 31
Transactions (api/v2/public/transactions) 31
Update Order (api/v1/jobs/orders/UpdateOrder) 32
Addressed an issue with date formats 32

The Platform

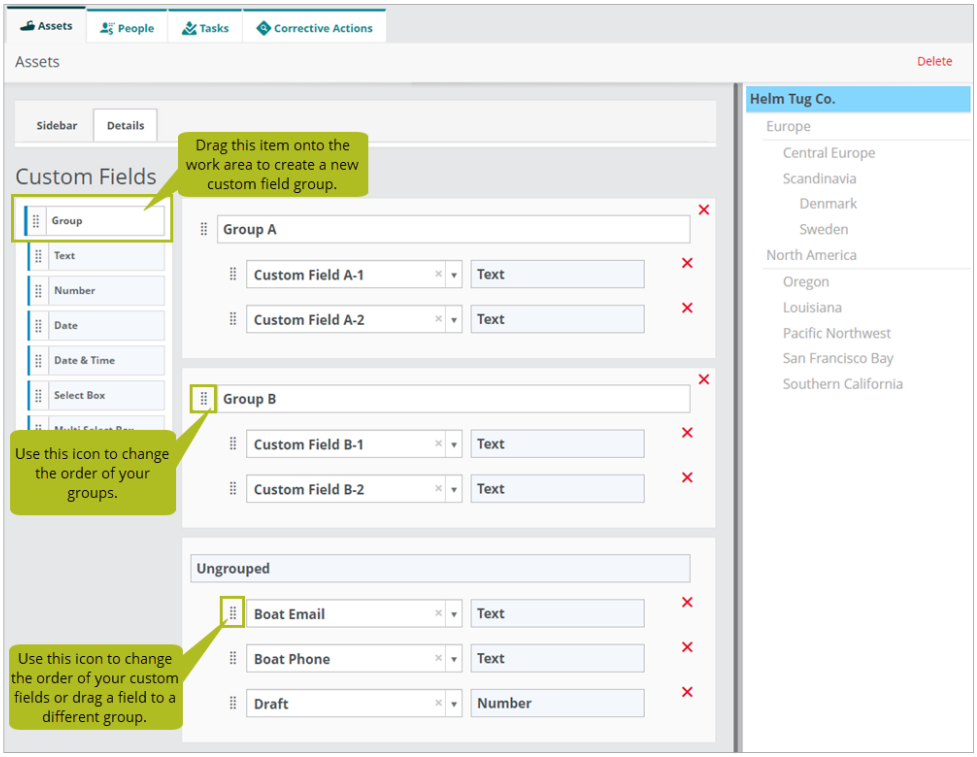
Our "platform" is our base product and includes the features and functionality shared by all our customers. Changes to our platform affect everyone, regardless of the product lines or modules you subscribe to. We made the following platform changes in this release.

Organize your asset custom fields by group

You can now organize your custom fields on the Management > Assets > Assets > Details sub tab into groups.



You can set up and manage your groups from the Setup > Field Configurations > Assets > Details sub tab.



Any custom fields created prior to Version 1.24 will be added automatically to the "Ungrouped" group when you upgrade to this release, but you can easily move them to a different group if you like. Ungrouped custom fields will be displayed with the stock fields near the top of the Management > Assets > Assets > Details sub tab.

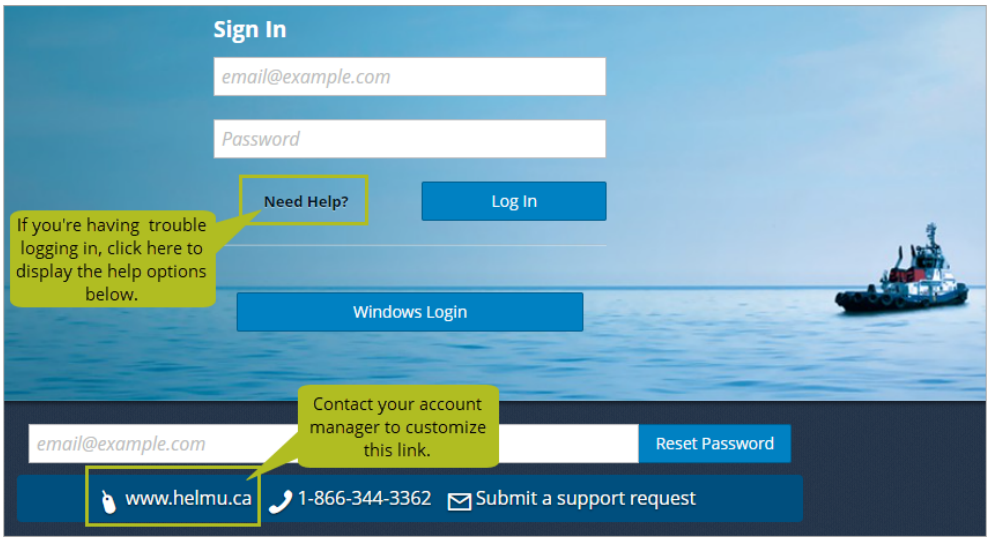
Note As part of these improvements, we removed the "New Custom Field" button from the Management > Assets > Assets > Details sub tab. You must now add custom fields for your assets from the Setup > Field Configurations > Assets > Detail sub tab.

Save time when searching or applying filters on the Locations tab

To save you some time, the most recent search you entered or filters you applied on the Setup > Locations > Locations tab will be now be remembered the next time you visit the tab.

Customize the support link on the Sign In page

By default, the support link displayed on the Sign In page when you click “Need Help?” takes you to the Helm CONNECT Support website (www.helmu.ca), also known as Helm U. Customers who would prefer their users to contact an internal Support or IT department may now customize the text and URL for this link.

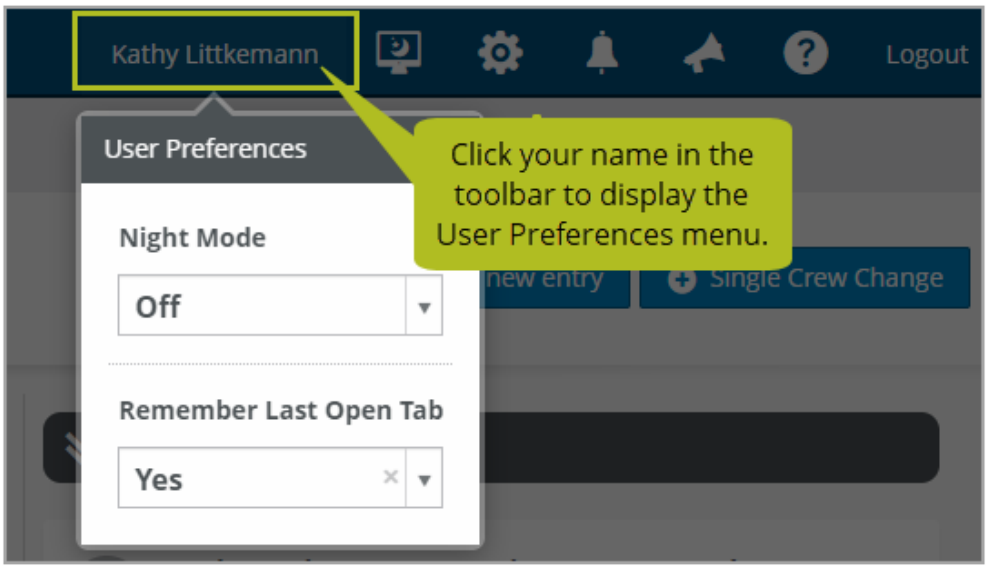


Note Please reach out to your account manager if you’re interested in customizing this link.

Customize your personal settings in Helm CONNECT

We created a new User Preferences menu where logged in users can customize their personal settings for Helm CONNECT. Once you’re logged in, click your name in the toolbar to display the new menu and choose from the following options:

- **Night Mode**: This gives you the same options that were previously available from the Night Mode icon on the toolbar.
- **Remember Last Open Tab**: This new option lets you to decide if you want Helm CONNECT to remember and display the last tabs you had open instead of automatically displaying the first tab for each menu item.



Updated technical requirements for asset installations

Helm CONNECT asset installations now require .NET Framework 4.8 instead of 4.5. Asset computers that don't already have .NET Framework 4.8 installed will be upgraded automatically when they upgrade to Helm CONNECT Version 1.24.

Note Computers that upgrade to .NET Framework 4.8 must restart to apply the changes. In most cases, users will see a message prompting them to restart the computer. However, if multiple computers are connected over a local network, the message will display on the server computer.

Deprecation of Windows 7 in Version 1.25

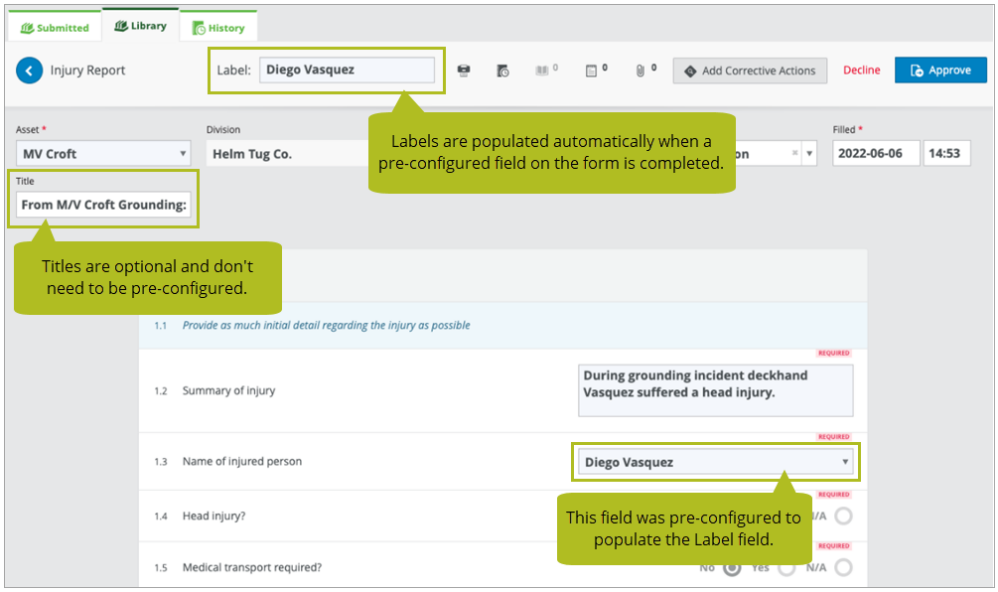
In Helm CONNECT Version 1.25, we'll be ending our support for the Windows 7 operating system. If you're currently using Windows 7 for any of your asset installations, we recommend that you start transitioning to one of our supported operating systems (64-bit versions of Windows 8 or Windows 10) to avoid any disruption to your use of Helm CONNECT. For more information, please check out the "Deprecating Windows 7 in Version 1.25" article on our support site, Helm U (helmu.ca).

Helm CONNECT Maintenance and Compliance

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

Use titles and labels to identify your forms

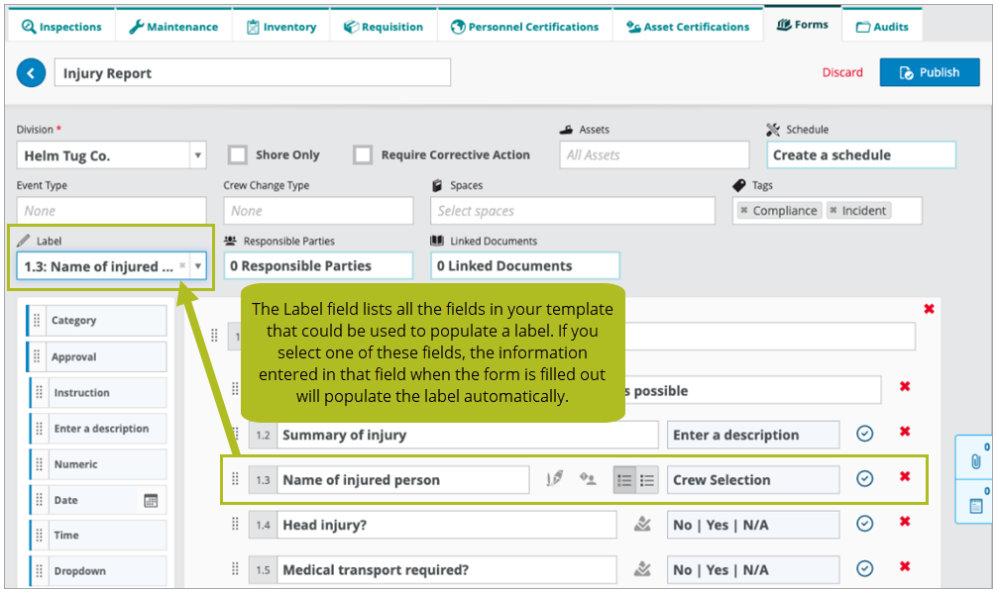
Previously, there was no easy way to distinguish between a list of in progress or completed forms that were based on the same template. Forms take the same name as the template they're based on so, for example, if the template name is "Injury Report" then any forms based on that template also appear as "Injury Report."



In this release, we added two new ways to help identify forms:

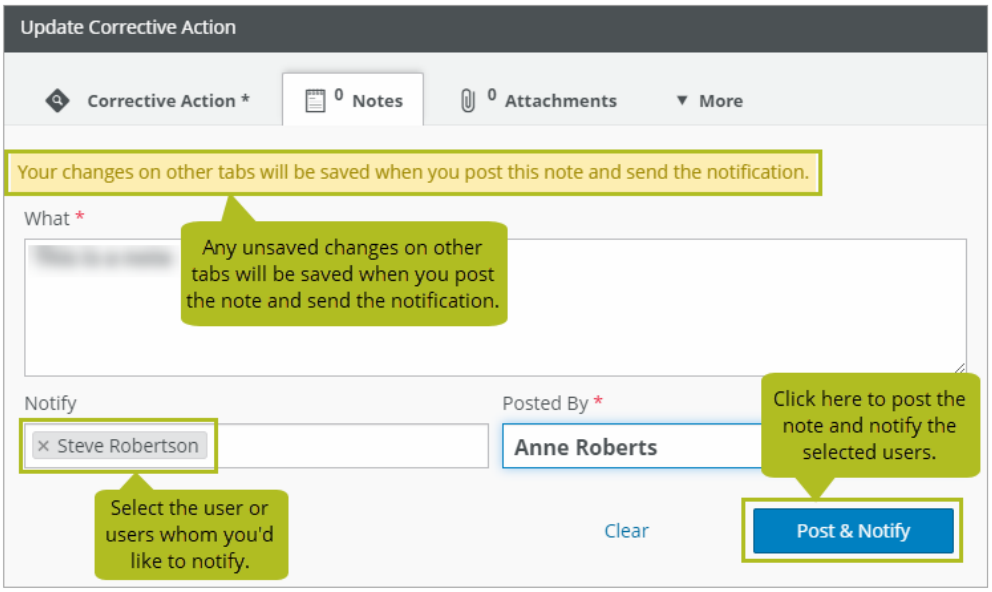
- **Title**: This is an optional field that doesn't require any configuration on the template. It can be completed and edited at any stage in a form's work flow, including in history by users with permission to correct history. Users can enter any text into the Title field, up to a limit of 50 characters.
- **Label**: This field must be configured on the form template and is populated automatically when a user fills out the form. For example, on the Injury Report form mentioned above, a Crew Selection drop-down field could be configured to populate the

Label field. When a user fills out the form, the name selected from the Crew Selection drop-down will populate the Label field automatically.



Send email notifications about notes on corrective actions

When you add new notes on the Notes tab in the Update Corrective Action window, a new Notify field allows you to send an email notification about that note to the selected users.

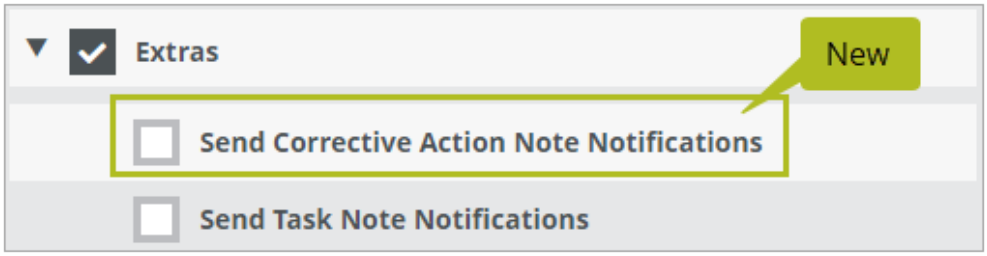


More about this feature:

- 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 Corrective Action 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 Corrective Action tab and who has Can Log In selected on their profile will appear automatically in the Notify field on the Notes tab. 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 Corrective Action window. You must first create and save the corrective action, then open it in the Update Corrective Action window to have the option to notify someone.

Control who can send notifications about notes on corrective actions

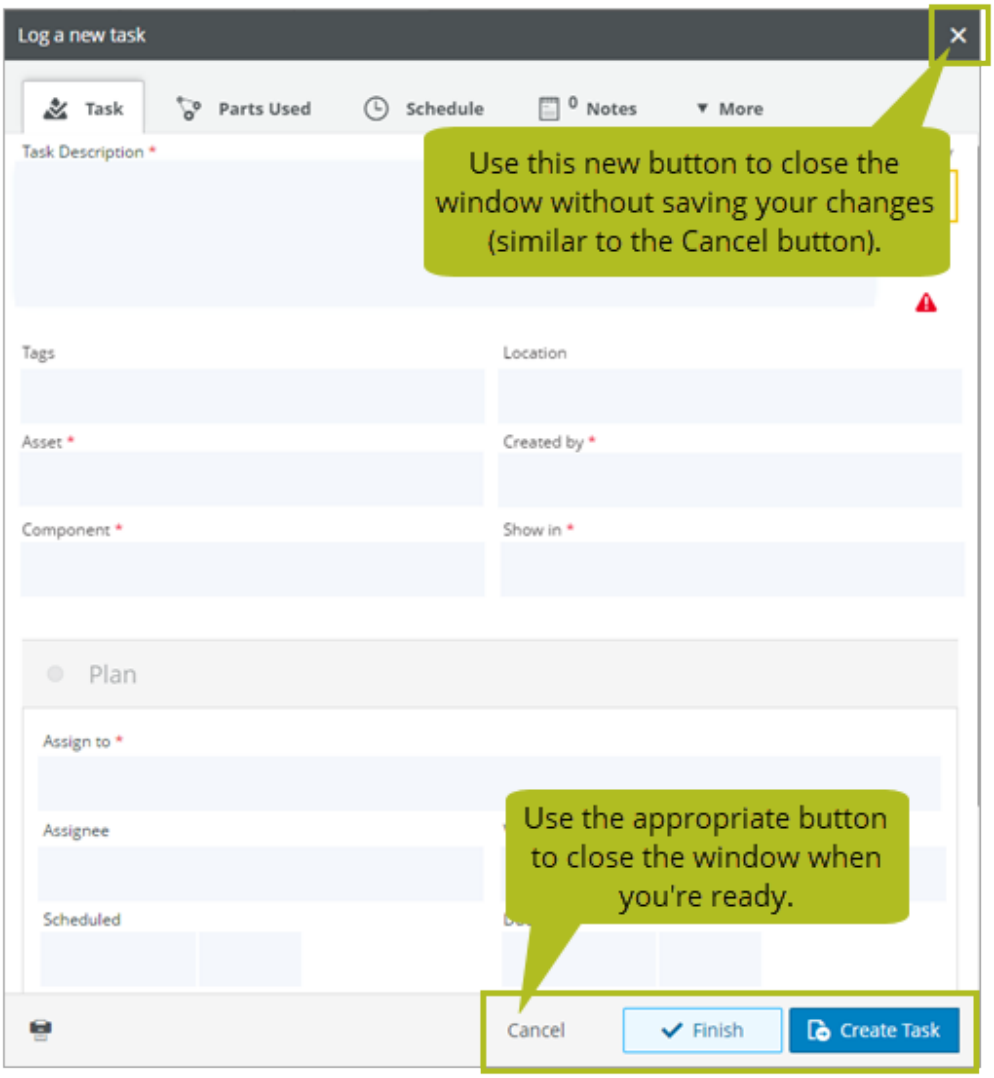
We added a new Send Corrective Action Note Notifications permission under Extras that controls who can send notifications about notes on corrective actions.



Note Users who already have the Send Task Note Notifications permission in their roles will receive the new Send Corrective Action Note Notifications automatically after the upgrade to Version 1.24. If other users need this permission, you must add it to their roles manually.

Stop closing the Task and Corrective Action windows by mistake

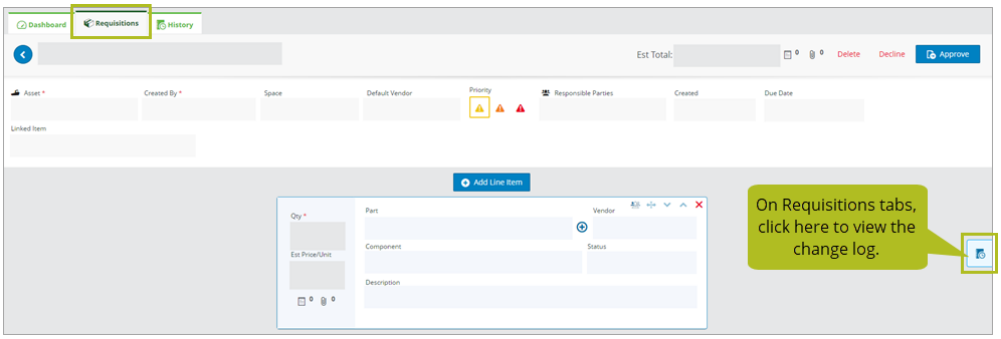
Previously, clicking outside any of the Task or Corrective Action windows would immediately close the window without saving any of the data you had already entered. This behavior was frustrating to many of our users. Now, the only way to close those windows is to either click one of the buttons along the bottom of the window—such as the Cancel, Finish, or Create buttons—or to click the new X button in the upper right corner of the window.



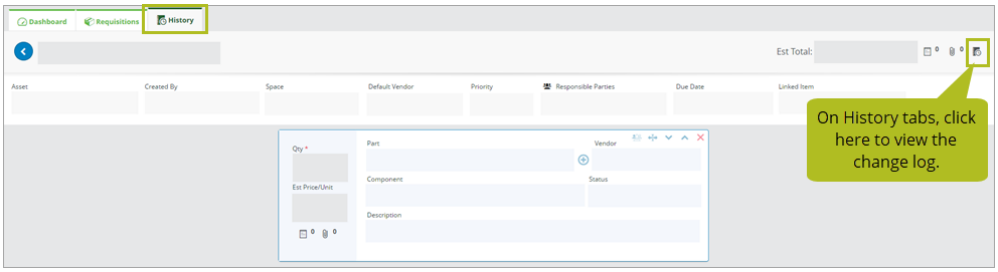
See who made changes on the Requisitions tabs

You can now view change logs for the following tabs in the Requisitions module:

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



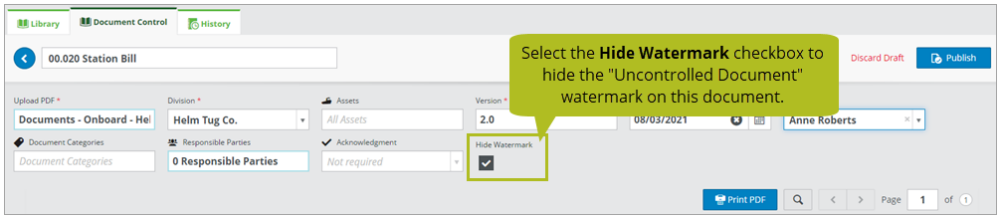
- Onboard > Requisitions > History
- Maintenance > Requisitions > History



Note Your role must include the Setup > Change Log permission in order to view the new change logs for requisitions.

Hide the “Uncontrolled Document” watermark when it’s not needed

Previously, all documents uploaded and printed from Helm CONNECT displayed an “Uncontrolled Document” watermark. Now, a new Hide Watermark check box on the Compliance > Documents > Document Control tab allows you to hide the watermark on new or existing documents.



More about this feature:

- Modifying the Hide Watermark setting on an existing document that has already been acknowledged by an asset will require the document to be re-acknowledged when you publish the change.
- New Hide Watermark columns on the Library, Document Control, and History tabs in the Compliance module allow you to see quickly whether or not each document has had the watermark hidden.
- All users with access to the Document Control tab will see the Hide Watermark check box. However, only users with the new Hide Document Watermark permission in their role can select or clear the check box.

Control who can hide the “Uncontrolled Document” watermark

We added a new Hide Document Watermark permission under Role Settings that controls who can hide the Uncontrolled Document watermark on selected documents.

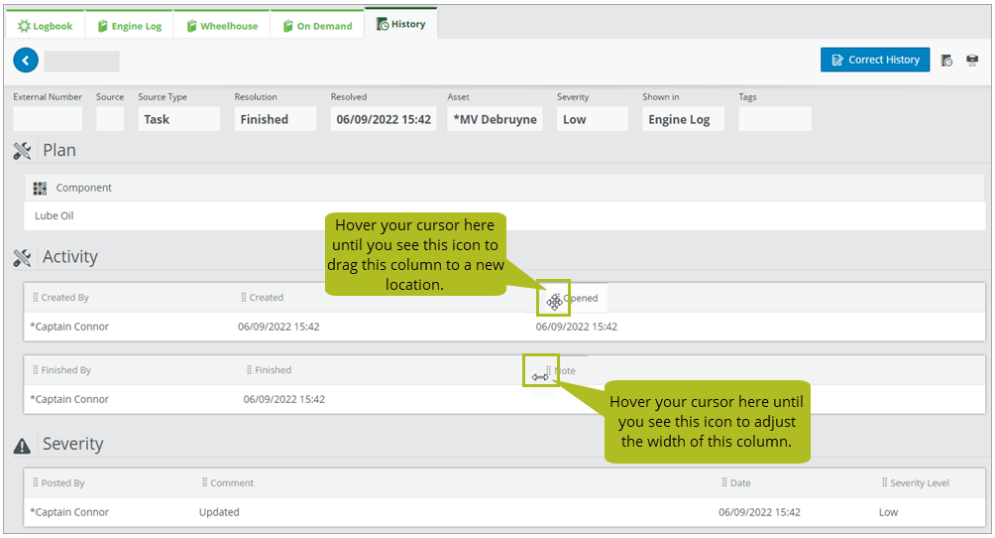
Note Users will not receive this new permission automatically after the upgrade to Version 1.24. If any users need this permission, you must add it to their roles manually.

Save time when applying filters on the Parts tab

To save you some time, the most recent filters you applied on the Setup > Parts > Parts tab will now be remembered the next time you visit the tab.

Customize the detail views on your History tabs

When you click on an item on one of the History tabs to see more details, you now have the option to adjust the width and rearrange the order of the columns.

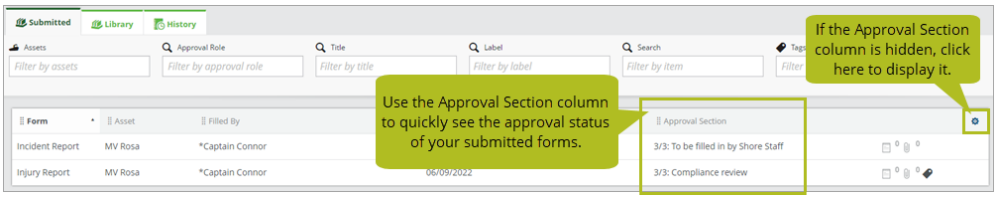


More about this feature:

- In addition to the changes described above, in the detail views for components, you can also show and hide any of the columns.
- The changes described above were not made to the detail views for readings or cumulative readings.
- Changes you make to a specific type of detail view will be remembered when you view that type of detail view again. Your changes will also be reflected when you print.

Quickly see the approval status of your submitted forms

Previously, there was no way to glance quickly at a list of in progress forms on the Compliance > Forms > Submitted tab and see where each form was in the approval process. The only way to see the status of a particular form was to open it. To address this issue, we added an Approval Section column to the list view on the Submitted tab so you can see the status of each form at a glance.



We also added the Approval Section column to the list view on the Compliance > Forms > History tab where it will either show the final approval stage for finished forms or which approval stage a form was in when if it was declined or cancelled.

Note The Approval Section column will be hidden by default after the upgrade to Version 1.24. Click the Column Selector icon in the header of the list view to show it.

“Task Type” label changed to “Source Type”

Throughout Helm CONNECT Maintenance, we changed the “Task Type” label to “Source Type.” The new label is more accurate and is consistent with the existing “Source Type” labels in Helm CONNECT Compliance.

Helm CONNECT Jobs

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

Streamline your dispatching process with the Helm CONNECT Portal

Introducing the Helm CONNECT Portal! This secure, easy-to-use interface allows your customers and agents to send order requests directly to Helm CONNECT and view the status and details of their orders in real-time. Your dispatchers can review order requests right from the Request Manager and bring them seamlessly into Helm CONNECT, thereby saving time and eliminating the need for duplicate data entry.

Note Check out "Meet Helm CONNECT Portal" on our blog (www.helmoperations.com) to learn more about the Helm CONNECT Portal and reach out to your account manager if you'd like to book a demo.

Use the Bill To Account in contract rules

You now have the option to select the Bill To Account field in conditions when building contract rules, including base rates, cancellations, surcharges, discounts, and commissions.

Note The Bill To Account field is not available in conditions when building tariff rules.

Understand why selected date ranges in Dispatch and Billing are invalid

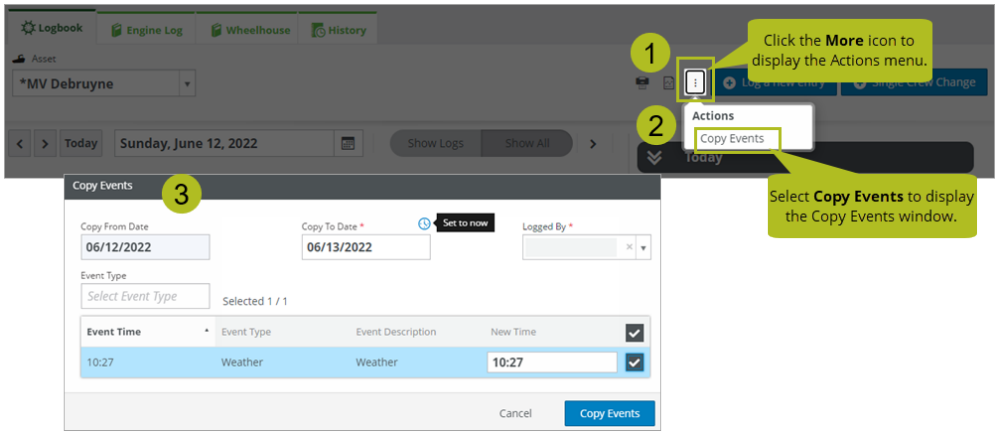
A new warning message lets you know you've selected an invalid date range if you accidentally enter an end date that occurs before the start date in the following places:

- Jobs > Dispatch > Trips tab
- Jobs > Billing > Overview tab

- Jobs > Billing > Transactions tab
- Onboard > Jobs > Trips tab

Save time by copying Logbook events

You can now copy previously logged events to a new date to save time when entering frequently logged events into the Logbook module.



Enter longer Logbook descriptions

In the Logbook module, we raised the limit for event and activity descriptions from 300 to 1000 characters.

Helm CONNECT Personnel

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

Payroll: Payroll forecasts now include manual adjustments

On the Personnel > Payroll > Payroll Details tab, you'll now see manual payroll adjustments in the forecast when you select the Show forecasted toggle. However, you won't be able to edit or delete them.

Note The Payroll Transactions report data source already included manual payroll adjustments in the forecast. This did not change in this release.

Work Rest: Configure multiple rest types

Previously, you could only configure one of your work-rest types as rest. Now, you can configure as many rest types as you need as long as the total number of work-rest types doesn't exceed ten.

Note Once you've configured a work-rest type as rest it can't be changed.

Work Rest: Change log displays correctly in all situations

We addressed an issue where the change log wouldn't load if you had entered data into a row on the grid and then approved it before saving it.

Work Rest: Filters no longer display too many crew

We addressed an issue where sometimes, more crew appeared in the Work Rest grid than were onboard for a given date range.

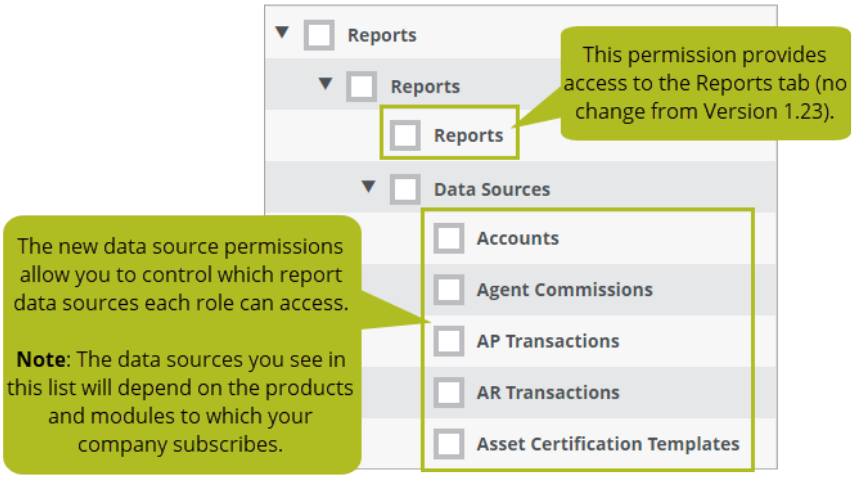
Reports and Dashboards

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.

Individual permission for each report data source

Previously, the permissions for the report data sources were difficult to understand because each one was related to the permissions for other features in the system. To remove this confusion and make it easy to control precisely which report data sources each of your roles can access, we created an individual permission for each data source.

After the upgrade to Version 1.24, all roles will have access to the same data sources they did in Version 1.23 and any existing reports will continue to work. The only difference is that you will now be able to examine each role and make sure it only has access to the report data sources that are appropriate for that role.



Note The permissions for the Emergency Contacts and Users data sources, which contain potentially sensitive information, are located in the Sensitive Reports group in the permission tree.

New Users data source

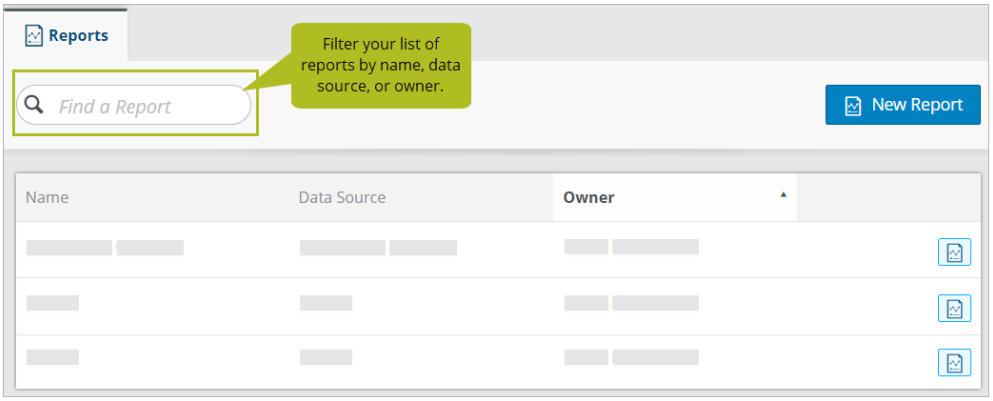
A user is someone who can log in to Helm CONNECT. In this release, we added a new Users data source to make it easier to review key login and security information about your Helm CONNECT users, including their login details and their divisions, secondary divisions, roles, positions, and departments. As the Users data source also provides access to potentially sensitive information, such as contact information, we added it to the Sensitive Reports group on the permission tree.

New Fuel Tables data source

We added a new Fuel Tables data source to help you review and report on fuel price trends across your operations, including an option to view just the current price.

Use filters to find your reports quickly

To help you quickly find the report or reports you're looking for, we added a text filter near the top of the Reports tab that allows you to filter the list by report name, data source, or owner. The text you enter will be remembered if you refresh or leave the page so you won't need to enter it again when you return. This is handy if there is a specific group of reports which you use frequently.



Include notes in your reports

Previously, there was no way to report on any notes added by users other than by using the Notes data source, which was designed primarily for Helm CONNECT Jobs. In this release, we added notes to the following data sources:

- AP Transactions
- AR Transactions
- Asset Certifications
- Assets
- Audits
- Billing Discrepancies
- Companies
- Contracts
- Corrective Actions
- Crew Certifications
- Crew Changes
- Documents
- Emergency Contacts
- Forms
- Form Templates
- Inspection Checklists

- Inspection Templates
- Inventory Checklists
- Interval Billing Trips
- Job Revenue
- Maintenance Checklists
- Maintenance Templates
- Orders
- Parts
- People
- Requisitions
- Resource Utilization
- Revenue Allocation
- Tasks
- Trip Revenue
- Trips

Convert Dates to Local filter added to Asset Utilization data source

We added a Convert Dates to Local check box to the Asset Utilization report data source. When selected, this filter converts all dates and times in the report to the time zone of the logged in user's browser.

Job Count and Requested Resources columns added to Trips and Job Revenue data sources

We added the following columns to the Trips and Job Revenue report data source:

- **Req. Resources**: Displays the text from the Req. # Resources field on a selected trip.
- **Job Count**: Displays the total number of jobs on a selected trip.

Hide Watermark column added to Documents data source

We added a new Hide Watermark column to the Documents data source to indicate which documents have been configured to hide the “Uncontrolled Document” watermark.

Label Item Number column added to Form Templates data source

We added a new Label Item Number column to the Form Templates data source. For each form template, this column will display the number of the item configured to populate the Label field.

Title and Label columns added to Forms data source

We added two new columns to the Forms data source:

- **Title**: Displays the value from the Title field for each completed form.
- **Label**: Displays the value from the Label field for each completed form.

Label change in the Tasks data source

For consistency with label changes we made in other areas of Helm CONNECT in this release, we changed the label on the “Task Type” column to “Source Type.”

Important Note This change may affect report data you have linked to systems outside of Helm CONNECT, such as Microsoft Excel and Power BI.

MC Dashboard: New Near-Miss page

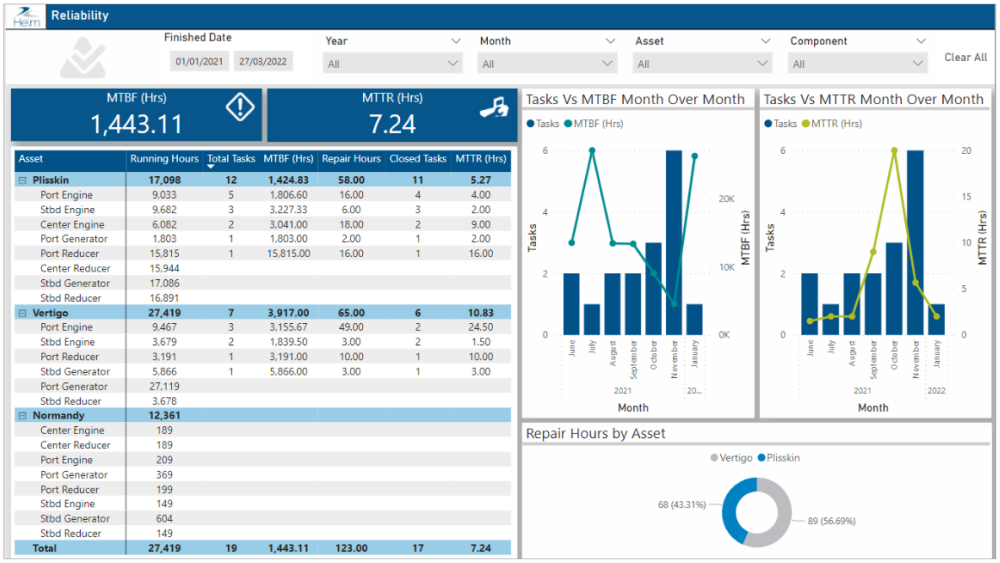
The Near-Miss page tracks near-miss data on a severity scale across your fleet to help reduce the severity and reoccurrence of future events. It provides a month-over-month breakout of near-misses by type and the probability of reoccurrence. It also determines the percentage of time that a stop-work order has been authorized.

Note The next time you open the MC Dashboard, you'll see a screenshot of the Near-Miss page and a message suggesting you reach out to your account manager if you'd like to set it up and start using it with your data.

MC Dashboard: New Reliability page

The Reliability page tracks how often your components are failing across your fleet, allowing you to monitor your metrics month-over-month, identify reoccurring problem components, and ensure repairs are being completed efficiently. It includes the following metrics:

- **MTBF (Mean Time Between Failures)**: How often components require repair on your assets.
- **MTTR (Mean Time To Repair)**: The average time it takes to complete a repair task on each component.



Asset	Running Hours	Total Tasks	MTBF (Hrs)	Repair Hours	Closed Tasks	MTTR (Hrs)
Plisskin	**17,098**	**12**	**1,424.83**	**58.00**	**11**	**5.27**
Port Engine	9,033	5	1,806.60	16.00	4	4.00
Stbd Engine	9,682	3	3,227.33	6.00	3	2.00
Center Engine	6,082	2	3,041.00	18.00	2	9.00
Port Generator	1,803	1	1,803.00	2.00	1	2.00
Port Reducer	15,815	1	15,815.00	16.00	1	16.00
Center Reducer	15,944					
Stbd Generator	17,086					
Stbd Reducer	16,891					
Vertigo	**27,419**	**7**	**3,917.00**	**65.00**	**6**	**10.83**
Port Engine	9,467	3	3,155.67	49.00	2	24.50
Stbd Engine	3,679	2	1,839.50	3.00	2	1.50
Port Reducer	3,191	1	3,191.00	10.00	1	10.00
Stbd Generator	5,866	1	5,866.00	3.00	1	3.00
Port Generator	27,119					
Stbd Reducer	3,678					
Normandy	**12,361**					
Center Engine	189					
Center Reducer	189					
Port Engine	209					
Port Generator	369					
Port Reducer	199					
Stbd Engine	149					
Stbd Generator	604					
Stbd Reducer	149					
Total	**27,419**	**19**	**1,443.11**	**123.00**	**17**	**7.24**

Note The next time you open the MC Dashboard, you'll see a screenshot of the Reliability page and a message suggesting you reach out to your account manager if you'd like to set it up and start using it with your data.

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 the “Next” link in some endpoints

We made changes that will affect the pagination on some endpoints. Please review the "Notices" section in our API documentation for more details.

Create Order (api/v1/jobs/orders/CreateOrder)

We added a CargoType field.

Find Activities (api/v1/core/activities/FindActivities)

We made the following fields filterable:

- ActivityTypeId
- FromLocationId
- ToLocationId
- RecordByPersonId
- FromDate
- ToDate

Find Divisions (api/v1/jobs/Divisions/FindDivisions)

We added a filterable ParentDivisionId field.

Find Events (api/v1/core/events/FindEvents)

We made the following fields filterable:

- EventTypeId
- RecordedById
- LocationId
- FromDate
- ToDate

Find Job Activities (api/v1/jobs/events/FindJobActivities)

We added a filterable ResourceId field. We also made the following fields filterable:

- ActivityTypeId
- FromLocationId
- ToLocationId
- RecordedById
- FromDate
- ToDate

Find Job Events (api/v1/jobs/events/FindJobEvents)

We added a filterable ResourceId field. We also made the following fields filterable:

- EventTypeId
- LocationId
- TripId
- RecordedByPersonId
- FromDate
- ToDate

Find Orders (api/v1/jobs/orders/FindOrders)

We added a filterable CargoType field.

Find Part (api/v2/public/parts)

We added a new field called IsRequested to the GET endpoint.

Find Requests (api/v2/public/requests)

We made the following changes:

- Added a new filterable Modified field
- Added support for the “Type” field to be “Part”

Find Trip Events (api/v1/jobs/events/FindTripEvents)

We made the following fields filterable:

- EventTypeId
- LocationId
- FromDate
- ToDate

Find Users (api/v1/jobs/users/FindUsers)

We made the UsersId field filterable.

Locations (api/v2/public/locations)

We made the following fields filterable:

- Divisions
- Parent

Transactions (api/v2/public/transactions)

We made the following fields filterable:

- TransactionType
- ParentTransaction
- ReversedTransaction
- OriginalTransaction
- Account
- Company
- Contract
- CurrencyType
- CreatedByUser
- ModifiedByUser
- SubmittedByUser
- BillingInterval

Update Order (api/v1/jobs/orders/UpdateOrder)

We added a CargoType field.

Addressed an issue with date formats

In January, we released an update to address an issue where specific date formats were causing API calls to error.