Helm Connect

Maintenance and Compliance Software

TDI Vessel Users Guide

Revision 8

July 2020

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NS5 to Helm Connect

HELM Connect is a maintenance and compliance system much like NS5 in that each vessel will have a dedicated HELM computer. Your work is done on the computer itself- not the internet. You continue to work in the system daily and it will update itself in the background when internet is available.

HELM Connect has been configured with the equipment on your vessel, the checklists have been loaded into the system and the major standard jobs have been added.

Just like NS5, the worksheets and checklists are all attached to the task and can be printed out on demand directly from the work order. There are some slight changes in format and content, but not much.

Make sure you can log in

To **access HELM Connect** you will need an internet connection and user ID. **Contact me for user ID and temporary password at ShannonSmith@tdi-bi.com .**

Get Help

This guide includes cheat sheets for the tasks you will do most often. However, HELM has detailed, step by step directions for almost anything at **http://help.helmconnect.com/7.1.17/**. Use the left side bar to navigate to what you want OR use the search box at the top right.
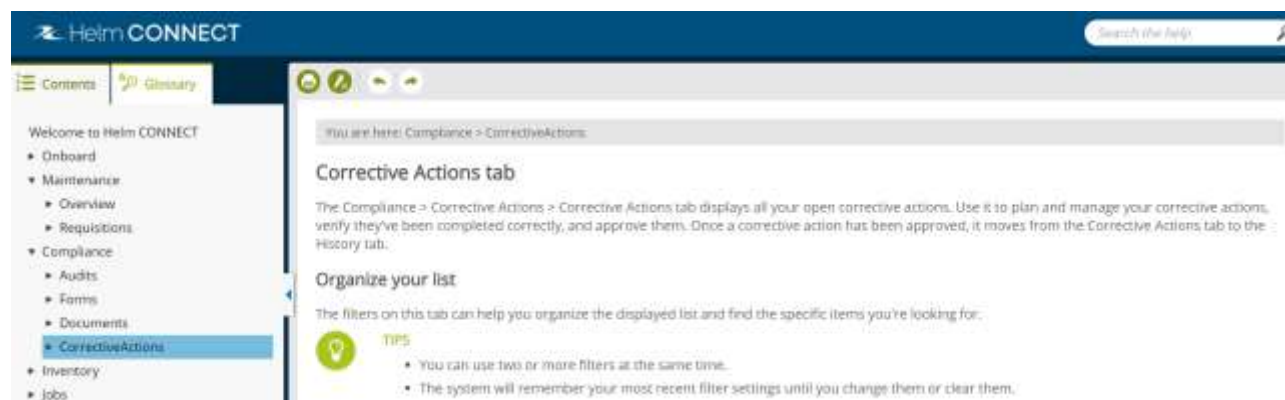
If you are on a vessel, login directly to the vessel Helm computer. If you are off the vessel or based ashore, you can login via the internet to **https://tdi-bi.helmconnect.com/**

Report any issues or problems to ShannonSmith@tdi-bi.com.

HELM Definitions

Definitions in HELM are very different from NS5. Helm definitions are:

Activities- A period of time with a start and end date. Some examples are Dry dock, Lay up, Down crewed- at dock, Overhaul or Emergency services

Asset- A vessel

Active/ Inactive- active status means personnel can be assigned tasks. For example, people who are off the vessel are "inactive" and cannot be assigned tasks.   Persons who have access to Helm for review and management purposes are also listed as "inactive" since they cannot be assigned tasks. However, they may still be able to assign tasks to others depending on their authorization.

Component- major equipment that requires a maintenance record and may have running hours or a serial number.   For example, each piece of critical equipment is a component and may have many subcomponents. Engines and generators are maintained by running hours and are major components.

Events - A single moment in time. Opening an event triggers a specific form to fill out- such as a permit, incident, meeting or drill.

Equipment Explorer- where you can view all the equipment on a vessel and its relationship to other equipment. In HELM this is located under **Maintenance/ Assets/ Vessel / Components**

Inspections- applies to multiple assets/ vessels. May or may not require approval. Any failures on the inspection will trigger a new task (work order) to address the issue.

Logs- planned maintenance records. What NS5 called our **Maintenance Calendar is called a "To Do" list** in Helm. It is located under the Onboard/ Logs tabs.

Non Conformities- In Helm, NCs are generated from failed items in audits, just as they did in NS5. Each NC will trigger a required CAR for follow up.

Parts- consumables that are discarded or replaced to keep a component running. Filters would be a part.

Survey- can apply to multiple assets/ vessels, may or may not require approvals, can be completed in sections.   Example: The Quarterly Maintenance Inspection would be considered a survey because it covers multiple areas and each area can be completed by itself.   Life Saving is a single inspection in this survey and can be completed on its own by one user. The electrical section is a separate inspection and can be completed by another person on another day. When all areas are complete, then the survey (QMI) is complete. (Load line and other 3rd party surveys are tracked in Asset compliance module)

Tasks- what NS5 called **work orders**.   Tasks can be generated by a due date, by a failed item in an inspection or checklist (Like Quarterly Inspection failed item) or created as needed for unplanned maintenance.

Standard Jobs- Standard jobs are generated from checklists, inspections and surveys. These are all items that repeat at defined intervals- such as weekly or monthly or are triggered by running hours. These will generate tasks to appear in the bridge or engineering workspaces as scheduled.

Tour of HELM screens and sections

HELM Default screen. When you log in this is what you will typically see. The left side is the main menu. You can **collapse the menu** by clicking on the small arrow to the right of Helm Connect. The right side **Log** lists the most recently completed jobs. It can also be collapsed by clicking the small Logs arrow. Click arrow again to expand. The middle column is the "To Do" list- or tasks currently due.
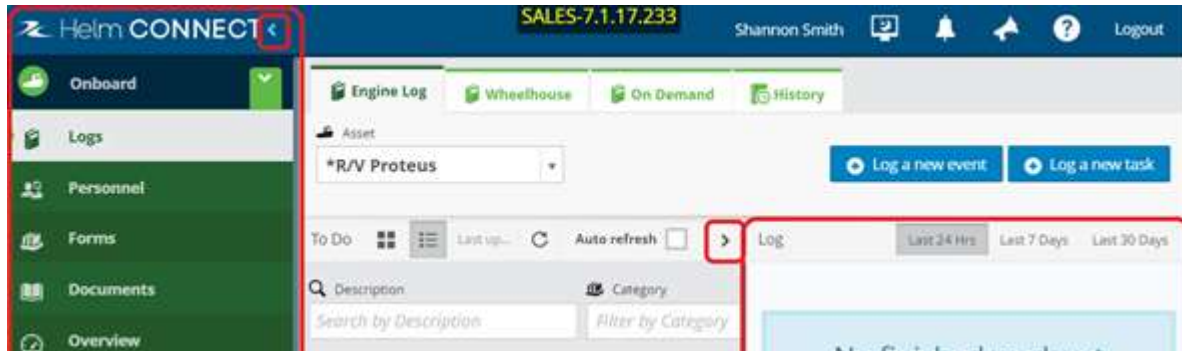
If you collapse both the main menu and Logs, you will see the open work orders / logs in the middle of the screen. **You can hide the column headings you don't want to see** by clicking on the small gear icon at the top right of the table. **To close the pop up menu, click anywhere outside of the menu box**. (there is no x in top right corner like in windows applications)
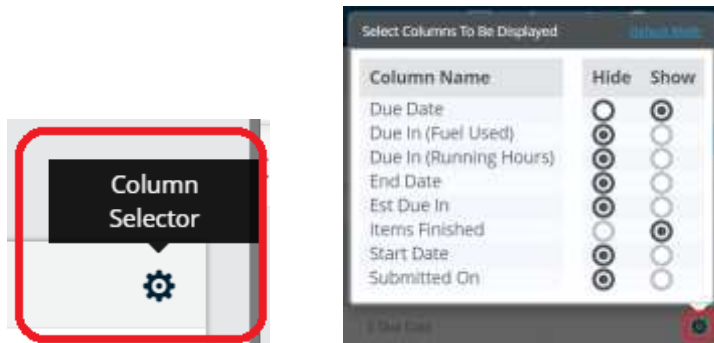
You can make the columns wider or narrower by hovering between them on the gray bar until you see a double ended arrow. Just click and drag the direction you prefer.

View your To do list

There are two ways you can look at your To Do list: **Onboard/ Logs** and **Onboard/ Overview.** However, you can only export or print the tasks from **Overview.**

Onboard/ Overview gives a **bird's eye view** of all departments, all tasks and due dates. The default view shows the oldest items first, just like NS5 used to do. Overview also has a status bar showing how many total tasks, how many are planned/ unplanned and overdue. For shoreside personnel, this will include all vessels in the fleet. However, each vessel will only see its own tasks and data.
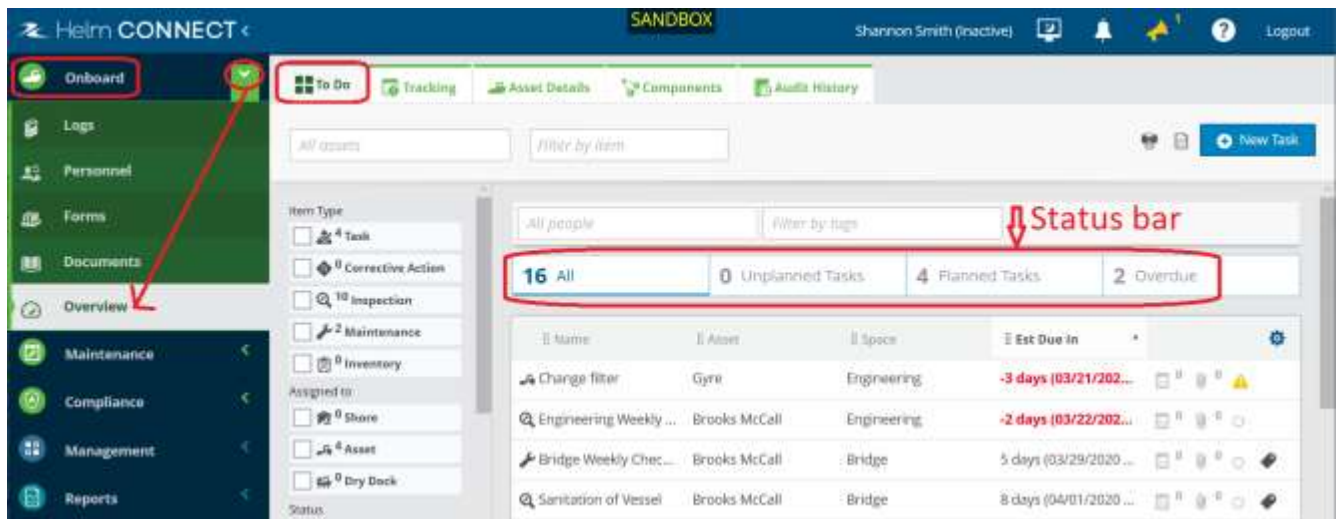
You can sort any column by clicking on the title name. Click on Asset column to sort by vessel, Name column to alphabetize by name of task, etc.

The icons on the right side quickly tell you if the task has any Notes, attachments, if it has been started or not, status of work, priority level, if it is part of a critical system and any tags to identify it.
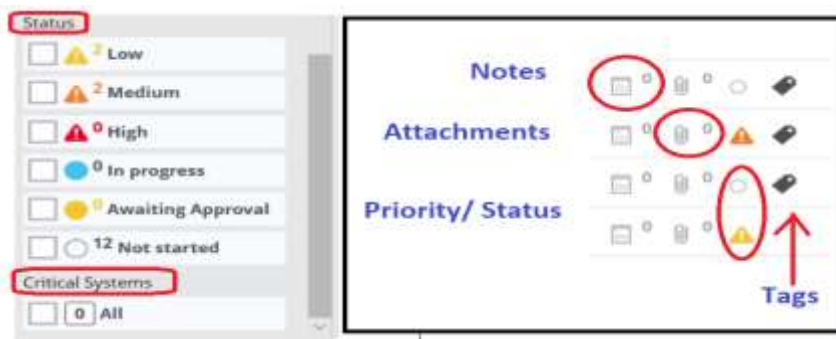

Hovering over the tag will tell show you what the tag says.

Onboard/ Logs separates tasks by departments. So if you are on the **Bridge** tab, you will only see bridge tasks. If you are on the **Engineering** tab, you will only see engineering tasks. The **History** tab shows completed work for all departments.
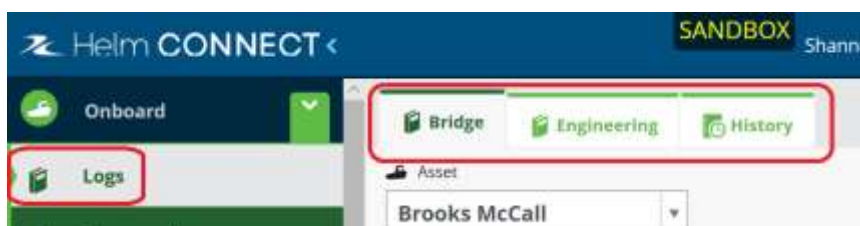
In each tab, the **To Do** column shows tasks to be done and the **Log** column shows completed. For the best view of the To Do tasks, click on the **Log arrow** to collapse it and the **Onboard/ Menu** arrow to collapse it.
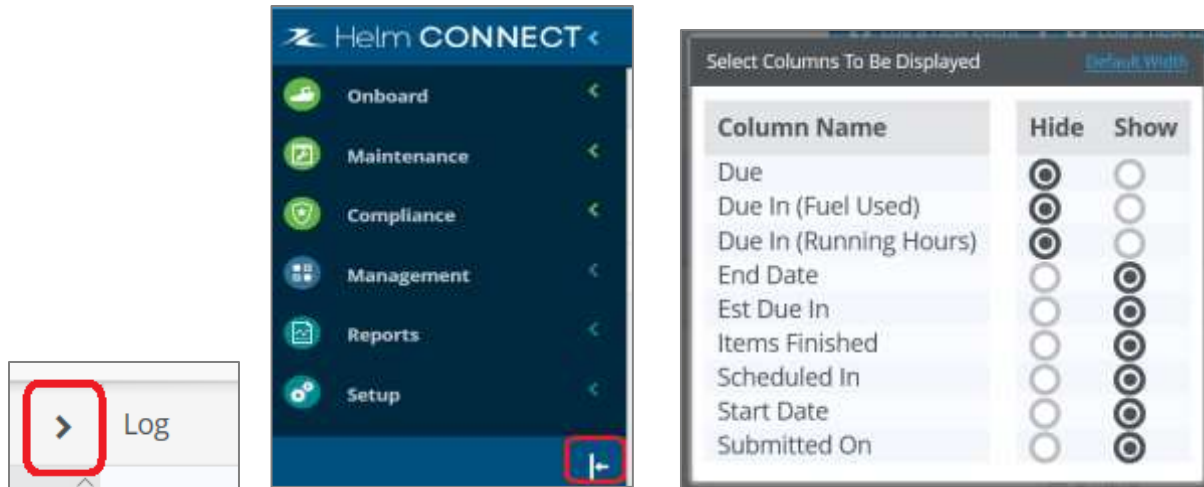
You can hide the columns you don't want to see by clicking the gear icon on the top right of the table.

Gear icon: To Do list: Select card view or list view

In the list below, the columns are set to show only the due date. The rest is automatic. Category, Descriptions and icons to the right cannot be hidden. However, you can adjust the width of each column by hovering the cursor between the columns until a double arrow appears, then slide right or left.

Printing and exporting the To Do list

To print the list to a printer, click the printer icon next to the **New Task** button on the upper right of the screen. (It does not offer the option of saving to a pdf.) To export to an excel spreadsheet, click the chart icon.
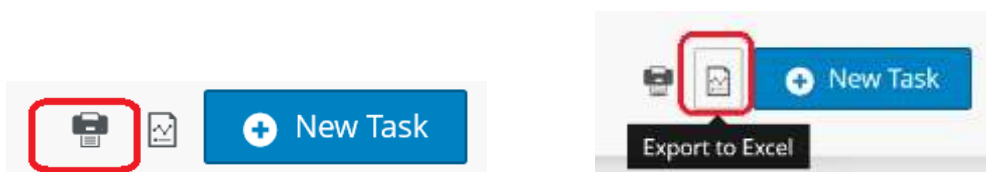
Enter Daily Running Hours

Open Onboard>Logs>Engineering tab. This task will be at the top of the list.

Open the task and enter your name as Inspector and the current date.

When you select the inspection date, the estimated current running hours will automatically be filled in the "Current" box.

You will enter the ACTUAL CURRENT RUNNING HRS in the TOTAL BOX.

The system will calculate the difference for you and fill in the Add hrs box.

There will be occasions when you may have missed a few days of entry. Just enter the current running hours in the total box and the current date for inspection date.

Attach a document to a Helm record

To attach a document, open the task and click on the top menu bar on the paper clip icon.

The attachment window will open:
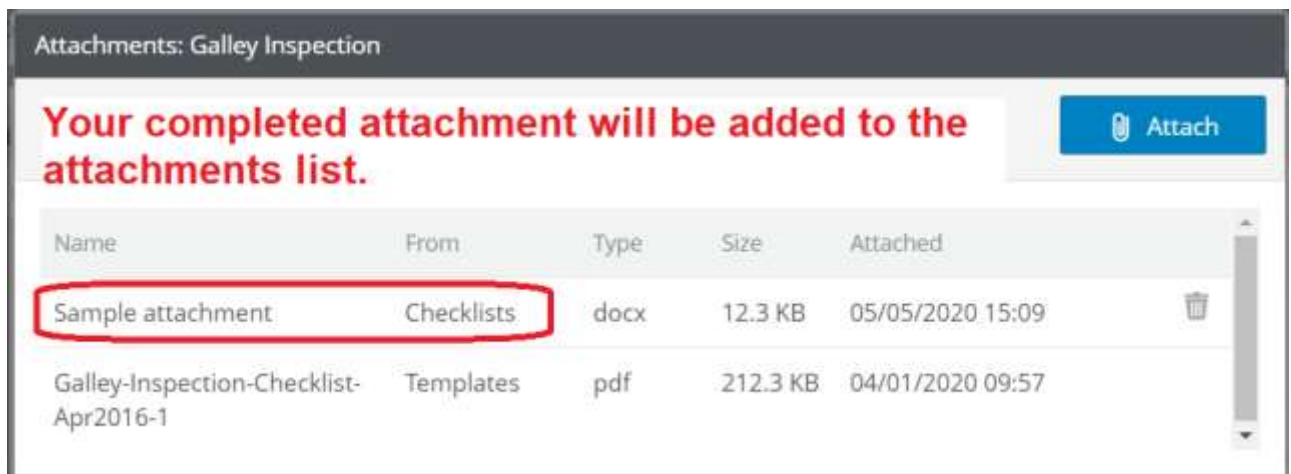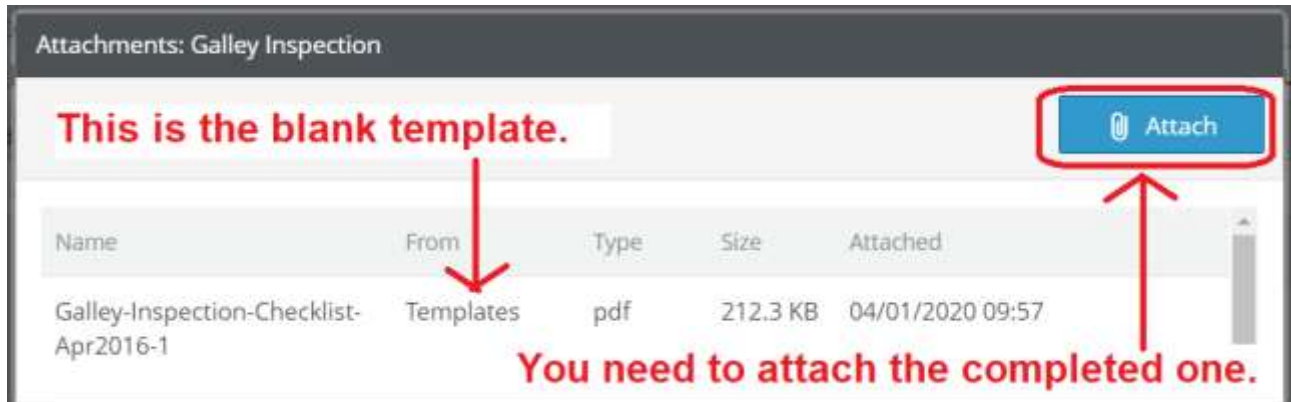
Click anywhere outside of the attachment list to close it.

Tasks: Complete a Task (Planned Maintenance)

Click on any task to open it. From this window you can add notes, attachments, change the severity level, and connect to the component/ equipment affected. You can also click the print icon to print out the detailed work order/ task. This will only print out the basic task- not attachments.

Tasks: Create a Task (Unplanned Maintenance)

Scenario: During coring operations one of the hydraulic lines burst, spilling fluid on the deck. You now have two things to report:

Event: Hydraulic spill- contained to deck (will describe how to create an event in next section)

Task: Conmaco winch- replace hydraulic line

You can create a new task from either **Onboard/ Logs** or **Onboard/ Overview**.

To create an unplanned maintenance task, open **Logs** or **Overview** and on the upper right of the window, click **New Task** or **Log new Task**. Then **Log Task**.

Or
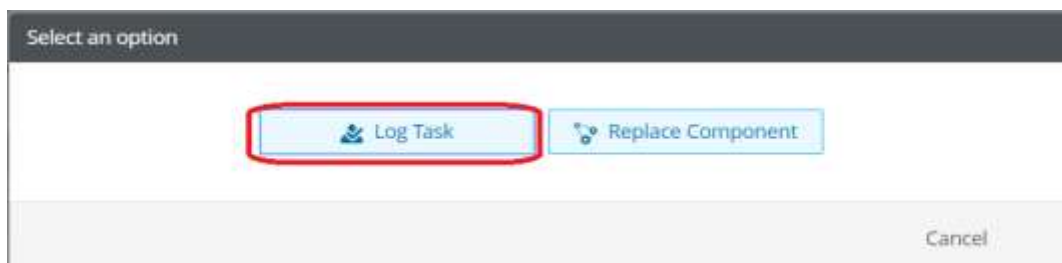
Two very important points!!

Use the ==NAMING PROTOCOL== in the Task Description and ==LINK the task to the equipment repaired.==

First word in the title is always the EQUIPMENT that was affected, followed by the repair done.

In this case, the title would be: "WINCH- hydraulic hose replaced"

Link the equipment using the **Component** field. **Scroll through the list to see the available components.**
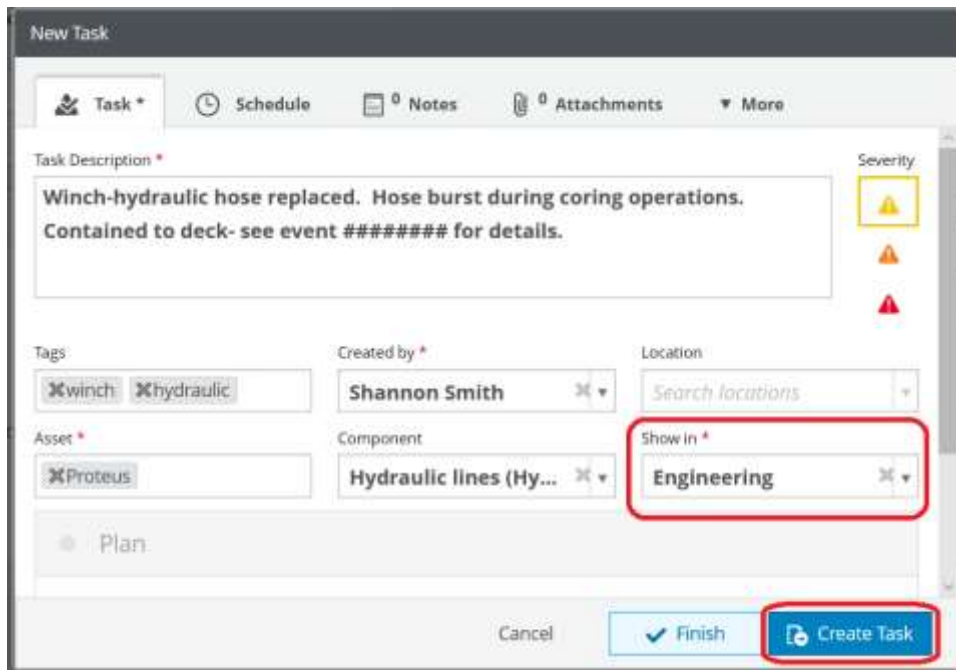
Enter your name in the **Created by** box. In the **Show in** box, enter the department responsible for completing the repair. The task will appear in only one workspace- Bridge or Engineering. A task cannot be assigned to both departments.

Use the scroll bar and scroll down to **Planned Task** section. Choose **Asset** if vessel is to complete work, **Dry Dock** if it has to wait until then and **Shore** if it requires shoreside intervention (like EPIRB sticker renewal).

If this task has NOT yet been completed, click the **Create Task** button.   The task will appear in the To Do list of the department you assigned in the **Show in** box.

If the task has been completed, Click the **Finish** button and the final screen will appear. Put the name of the person who completed the repair in the "**Who was this resolved by?**" box. Enter a quick

description in the "**How was this resolved**?" box and then **Finish** Task. The task will the move to the History tab.

And you MUST ADD NOTES in the "How was this resolved?" box.

To Create a new Permit, Drill or Meeting

Permits, drills and meetings are forms and are created as you need them. Log in and open your work space. To get a **BLANK FORM**, open **Onboard/ Forms/ Library**. There are three sections to the library: **In Progress , Awaiting Approval** and **Library**. Scroll down past the **In Progress** and **Awaiting Approval** sections to the **Library** section.
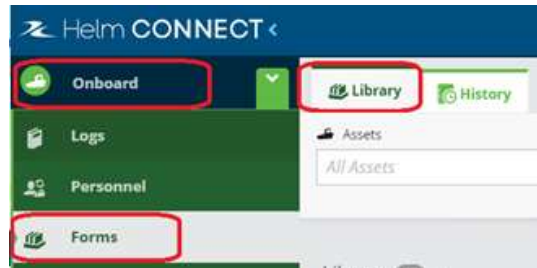
Open the drill or meeting you want. On the right side will be an **attachments tab**. Open it up and click on the attachment name to **download and print the permit/ meeting/ drill sign in sheet.** Meetings and drills can be **Finished** without attaching a scan of the completed form.

***Completed Permits must be scanned and attached to the record.

DO NOT click FINISH until you have attached the completed, signed, scanned permit.

**Every time you open a form, it creates a new Helm record number (at the top of the form). If you fill in ANY part of the form, it will save the record. If you don't fill in anything, it will NOT save the record.

In this case, I opened the form just to print it out – I don't want to create a new record. So I didn't fill in any of the form or change the date.

Click the **BACK/ Finish Later** button to go back to the **Forms/ Library** list.

Expand the **In Progress** list. You will see the last form saved was FORM21. No new FORM23.

When you open a form, the **date and time will automatically fill with the current date and time**. ==Change the FILLED to match actual date and time of the meeting/ inspection/ drill==. You will need to select your name from the "Filed By" list. (Start typing and it will fill in matching names.)

Finishing a Permit, Meeting or Drill In Progress

To go back and finish an **In Progress** permit/ meeting/ drill, open **Logs/ Forms/ Library**. Click the expand arrow on the **In Progress** section to see all forms that have not yet been finished. Click on any **In Progress** record to open it.

Click the attachments icon at the TOP of the record to attach the signed, completed form.

Then finish any required fields and – ==once everything is finished and attached- then click **Finish Now**==.

Very important to click the "Finish Now" or your work will not be saved!! It will even ask you again to be very sure. So FINISH TWICE.

Open the **History** tab to see the completed drill. The **External Number** is the Helm record number. Note it is showing the completed drill attached to the far right. (That's the 1 next to the paper clip icon.)
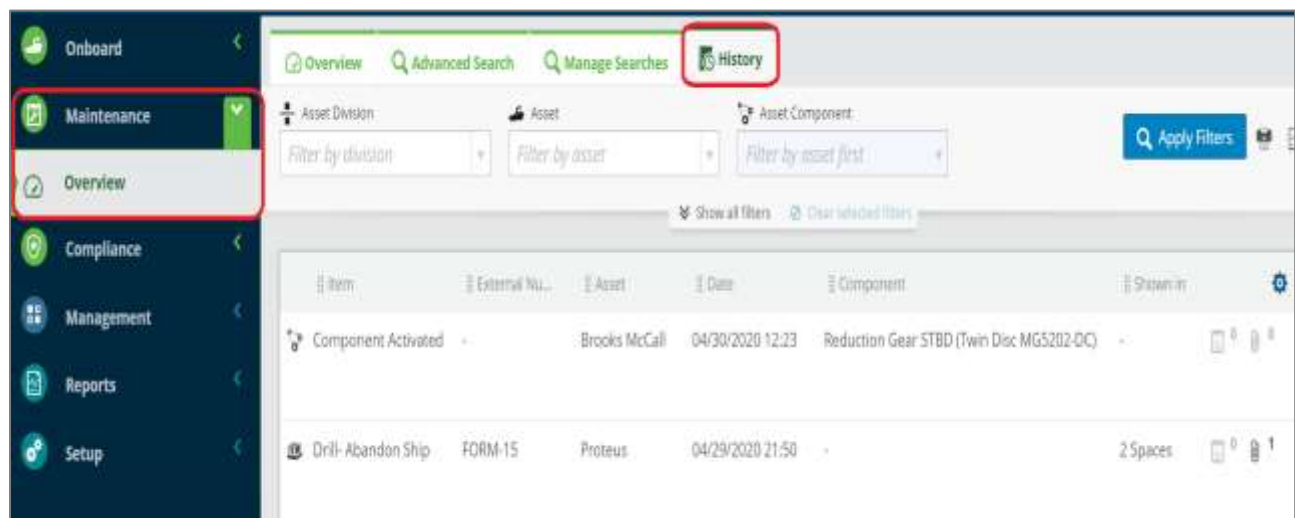
View maintenance history

Vessel crew will view maintenance history by logging in and going **to Onboard/ Logs/ History.** They will only see their vessel.
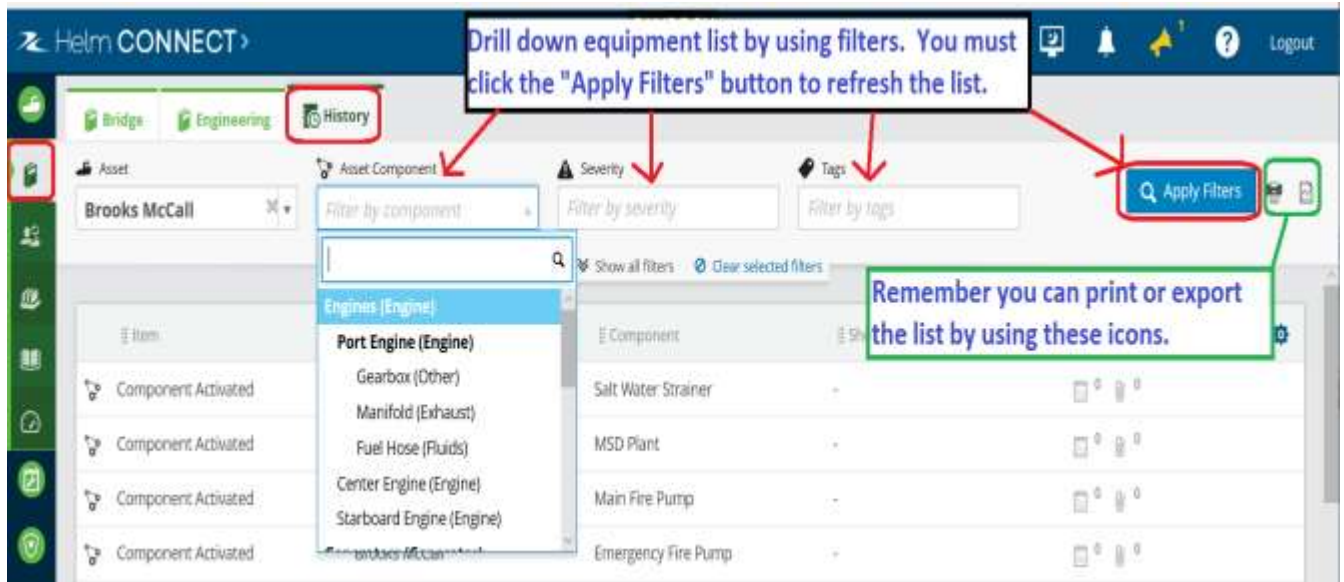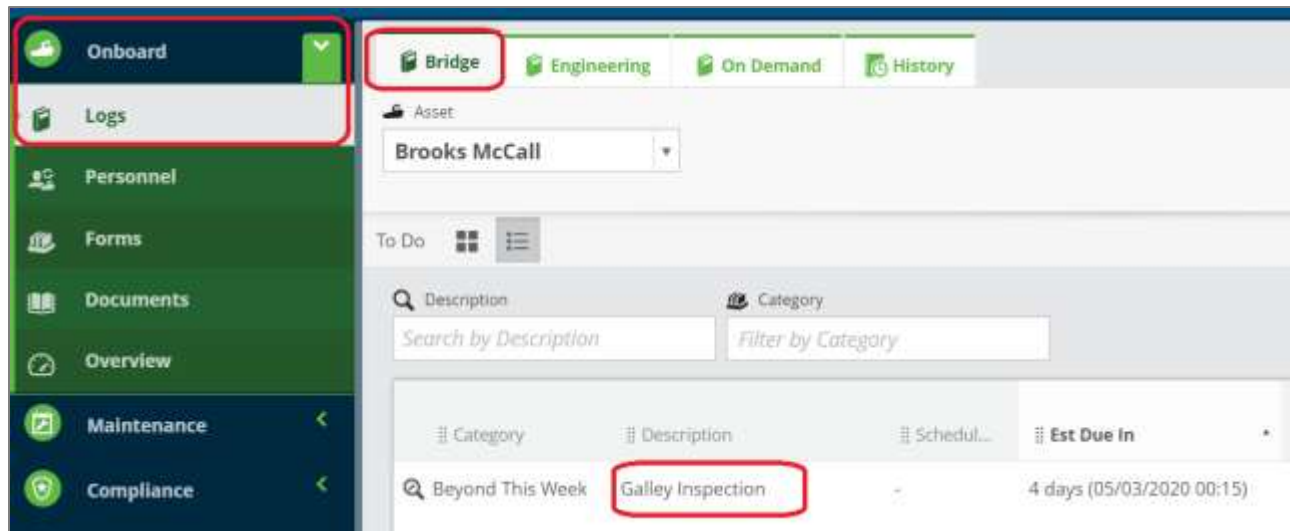

Shore staff can view maintenance history by going to **Maintenance/ Overview/ History.** The filters remain almost the same, but shore personnel can see the entire fleet.
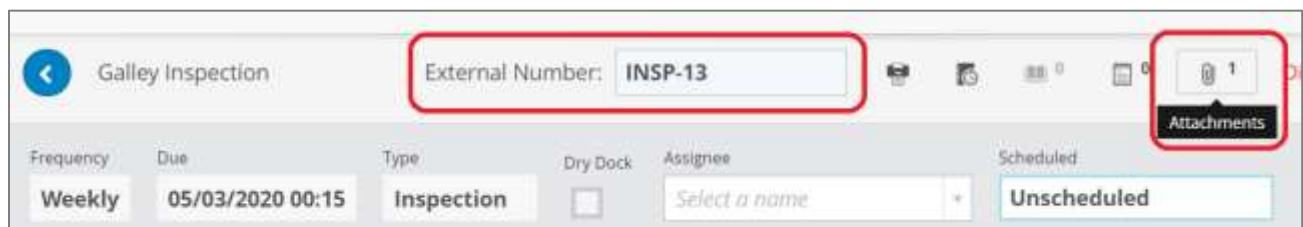
Completing a Checklist

Checklists will appear in the work space of the department that is supposed to complete it. In this case, the galley inspection is in the **Bridge** work space under **Bridge/ Logs**.
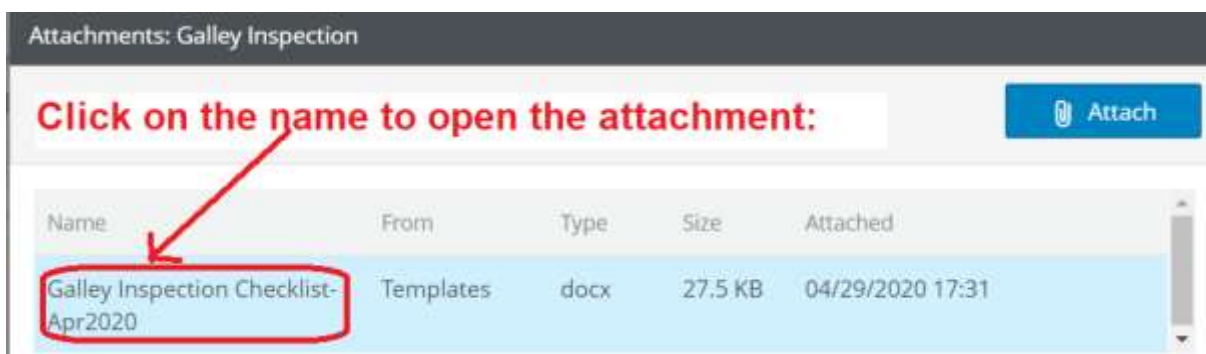

Click anywhere on the task box to open it.

Click on the **attachments icon to GET** the checklist.

Click on the **name of the attachment to OPEN** the checklist. (The line will turn blue when you hover over it)

1	Galley Inspection
1.1	Print the attached checklist and take it with you as you do the inspection. If any item cannot be corrected during the inspection, Choose FAIL. That will create a new, separate task in Helm. Include the notes for the failed item and keep the new task OPEN until the repair is completed.
1.2	Galley sanitation checklist — **REQUIRED** — Fail ○ Pass ○

In this scenario, food was found stored directly on the floor of the pantry- a **Fail**. The mate decided to have clean wooden pallets cut in half to provide required clearance from the floor and assigned the task to the AB on the next shift. <mark>When you click the fail button, it opens a new **Task**.</mark> Fill in the required information and **Create Task**.


You can **finish the original checklist task**.

But **leave the new task open** until the failed item has been corrected.

What if you have the same failed item on the next inspection?

Maybe you haven't had time to get parts or do the repair. If you check "FAIL" on the same item the next time you do the checklist, Helm will ask if you want to use the existing task you created last time OR if you want to **Create New Task**. If the issue is the same, **click on the name of the existing task** to use it.
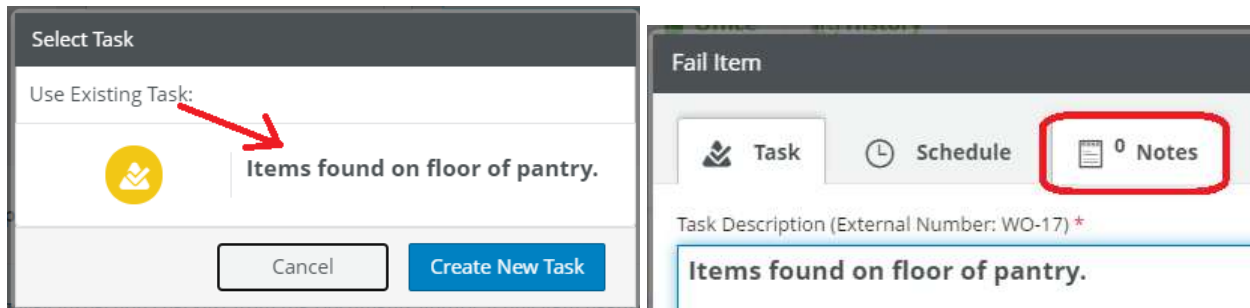
Helm will open the existing task. If the issue is closed, click **Finish**. Helm will open the final window asking for name of person resolving and how resolved. Click **Finish Task**.

If you still cannot resolve the issue this time, click on the **Notes** tab to update your progress or explain the delay.

Click outside the Notes window to go back to the main task page and click **Save Task.**
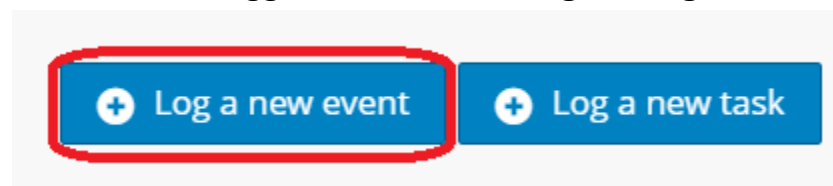
How to log an Incident

There are three types of incidents in Helm:

Health: Illness, injury, chemical exposure, dental, vision, anything requiring first aid, phone call to ISOS or visit to health professional ashore or a near miss related to any of these

Equipment: Failure, loss or damage to vessel or survey gear or near miss related to equipment

Other: fire, collision with other vessel, allision with non- moving object, security breach, stowaway, migrant situation, confrontation with local fishermen or non-governmental organizations or near miss related to any of these

Incidents are logged in **Onboard/ Logs/ Bridge** tab as **Events**.

Fill out all sections of the **Log an Event** window.

When you click **Log Event,** Helm will –

1. Send an email notification to the DPA and management team and

2. Create incident report forms as tasks for supervisor and employee under the Bridge tab.   These forms are to be finished within 24 hrs of the incident.

**** You will still need to contact the DPA by phone immediately.

**But you no longer have to send a separate email to DPA and HSE from the vessel.**

Filling out the Employee and Supervisor Reports

When you create an incident and choose the type of incident, the appropriate Employee and Supervisor forms will be opened and assigned to the **Onboard/ Logs** under the **Bridge** tab. Both are due within 24 hrs of the event.

📖	Today	Incident -Employee Report- Health
📖	Today	Incident-Supervisor Report- Health

The paper form is attached to the Helm record and can be printed out if more convenient. But you can enter these two reports directly into Helm and skip the paper.

When the Helm forms are completed, click **Finish Now** to close the records.

🖨   🕐   📖 0   📝 0   📎 0   Discard   **Finish Now**
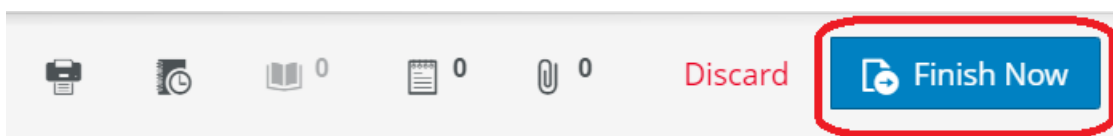
Filling out the Witness Reports

Witness reports are not automatically assigned for incidents because they are not always needed. Witness forms are on the **ShipNet Forms** page and also in Helm under **Onboard/ Logs** as an **On Demand** form.

Scan the completed witness reports and attach them to the **Supervisor Report** in Helm. Pictures, receipts, doctor's notes and any other documents related to the incident should all be attached to the supervisor report.
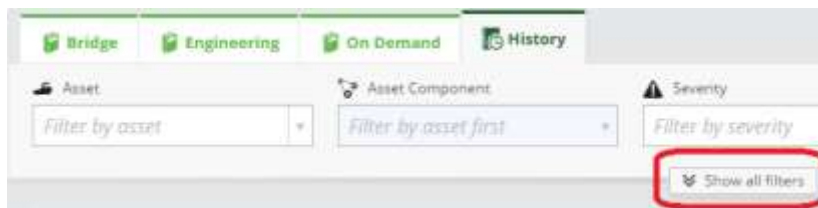
Any paper forms related to the incident should be filed in the TDI Binder System.

**It is not necessary to print and file a paper copy of the Helm reports in the binder system.   If you happen to have some paper documents related to incidents, that is where they go.

How to View Incidents

To pull up a list of incidents, open Onboard, Logs/ History.

Then open the search filters.

Enter Incidents in the Exact/ Broad Item box and then hide the filters.

You will get a list of incidents and the forms they generated. You can export or print this list by using the print/ export to xls buttons at the top of the page.
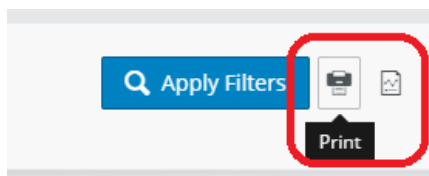
The incidents themselves will have a full name describing the incident.

Click on the incident to open and then you will see a list of attached documents.