



# Release Notes

Reference Guide

Service Suite (iWarranty)

Version 5.0 F000

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## Overview

PTC is pleased to announce the latest release of PTC Service Suite 5.0. This version contains new form redesigns to make the screens more compact and user friendly, new features, process improvements and software corrections. This document outlines all of the product updates included within this release.

This release is available as a downloadable file.

This Service Intelligence installation is available is 10.2.1 Fix Pack 4 update of IBM Cognos, available as a download but on separate request. This is because you need to have a licensed version of Cognos with IBM, including obtaining a license for the Cognos Workspace and Cognos Workspace Advanced modules.

Installation instructions for each of the components are available in their respective downloaded files.

Service Suite documentation is available in English however the application can be run in the following languages; -

- Chinese (Simplified)
- Chinese (Traditional)
- English (US)
- English (UK)
- French
- German
- Italian
- Japanese
- Korean
- Spanish (Castilian)

## New Features added for this release

### Licence Key Manager

A new feature has been added to Service Suite to introduce a licence key handler. Service Suite will now require a licence key to operate.

**Ref: WCM-4549**

### MS Edge Browser now supported

MS Edge is now a supported browser with Service Suite. This addition is also reflected onto the Certified Platform Matrix Guide.

**Ref: WCM-4785**

### ETL Data Purge

A new process has been added to the ETL transformation to allow data purges to be initiated to remove or archive and remove data within the Application Database and also Data Warehouse.

**Ref: WCM-4731**

### Service Exchange: Addition of Personnel Data within the Business Partner CSV data set

The Service Exchange process for Business Partner CSV load has been updated to include Personnel data. This information was being addressed within the XML data service but was not available in the CSV Service. This information can now be loaded via CSV.

**Ref: WCM-4549**

## Application Improvements

### General

#### (WCM-4896) Sign Off Image Replacement

At the top of each screen there is a quick logoff/signoff button. This was a fixed image which meant it could not be controlled via the stylesheet, in relation to colouring. A new image has been added to compliment the new UI but to also allow this image to be coloured by the stylesheet configuration.

#### (WCM-4891) CLM Calendar UI alignment

The CLM calendar, or function known as the Financial Calendar has been updated to reflect the new UI look and feel.

#### (WCM-4856) Quick Search Screens standardization of layout

At the top of each screen within the header there is a quick search function for Claims, Parts Orders, Service Contracts, Service Orders, Supplier Claims, Support Requests and Technical Solutions. Each set of data has its own content but some values are common across each area. To align with screen consistency, the hyperlink to access the documents appeared in different positions. This has now been altered so that the following values appear in the same order-

- Document Number (Hyperlink) to access the related documents content.
- Type of Document
- Current Status of the Document.

## Service Hub

### (WCM-4463) Product Classification Form Redesign

The user form to add and maintain the Product Classification has been updated to become more user friendly and compact. This is to give a better user experience to reduce the scrolling that was needed on the previous single columned form. Data values have also been grouped together to reflect data content for configuration area, instead of being mixed.

### (WCM-4810) Work Queue Elapsed Search: Introduction of visual colour banding

In preparation of the planned reintroduction of SLA time frames for certain work queues, colour banding for SLA bands have been added to make the priority more visible to the user.

### (WCM-4781) Work Queue Search: Re-ordering of key fields and Introduction of scroll bar with fixed document ID

The Work Queue Search screen results have been reordered so that the document number hyperlink is always positioned in the 1st column, this is to reflect the search screens to give a consistent position of a hyperlink access.

### (WCM-4942) Skin Maintenance UI updates

Skin Maintenance has been updated to remove certain elements on the screen. Banner look and feel is no longer applicable in the new UI, therefore certain text and options have been removed.

### (WCM-4590) Update of Regions Listed in Saudi Arabia

A catalog update has been applied to ensure the regions for Saudi Arabia are correct. Regions since the last generation differ. These are now aligned as per current release date. Other Region updates are to follow in later releases.

### (WCM-4636) Removal of parameter 'ImageBasedMenu' option on the CLM Parameters

This true/false indicator is now no longer applicable due to the new UI. Therefore, this option has been decommissioned.

### (WCM-4775) CLM Parameter default for ClaimRepairDateDisplayOnly

On the Warranty Claim Failure tab there is a Failure and Claim Repair Date. By setting this option to

- **False** = the Claim Repair Date will default to the Failure Date
- **True** = the user is expected to fill in both dates manually.

The new out of box setting has been altered to **False**.

## iWarranty

### (WCM-4414 & WCM-4893) Product Registration Form Redesign

The user form to add and maintain Product Registrations has been updated to become more user friendly and compact. This is to give a better user experience to reduce the scrolling that was needed on the previous single columned form. Some data values have also been repositioned.

#### (WCM-4602) Create RMA Form Redesign

The user form to create RMA's has been updated to become more user friendly and compact. This is to give a better user experience to reduce the scrolling that was needed on the previous single columned form. Some data values have also been repositioned.

#### (WCM-4820) RMA details Form Redesign

The user form to maintain RMA's has been updated to become more user friendly and compact. This is to give a better user experience to reduce the scrolling that was needed on the previous single columned form. Some data values have also been repositioned.

#### (WCM-4472) Product Maintenance Form Redesign

The user form to maintain Product Serial numbers held in Service Suite has been updated to become more user friendly and compact. This is to give a better user experience to reduce the scrolling that was needed on the previous single columned form. Some data values have also been repositioned.

#### (WCM-4827) Alignment of Service Contract Details Form

The user form to create and maintain Service Contract details held in Service Suite has been updated to become more user friendly and compact. This is to give a better user experience to reduce the scrolling that was needed on the previous single columned form. Some data values have also been repositioned.

#### (WCM-4779) Search RMA 'Entity' value to be moved to high position within filter

Search RMA screen has been altered so that the Entity appears above the main search filter. Entity is always populated and controls the entire content of the screen. As this was in the lower filter section it became difficult to see the data set the user was looking at. Therefore, this data element was moved above the main filter section for better visibility.

#### (WCM-2284) Product Registration Number unable to be Updated by using change action

When a user choses to alter a Product Serial Number using 'Change' on the action bar, certain fields are opened up for update, to avoid the user needing to delete and re-enter the Registration.

Registration Number has now been opened up for alteration when 'Change' on the action bar is selected.

## iService

#### (WCM-4944) iService Process Improvements

Within the main iService main tab view there have been some UI updates and two buttons added. The buttons are to show the warranty coverage and also the open campaigns for the selected Product Serial Number.



## Application Issue Resolution

### General

#### (WCM-4864) SQL Server 2016 Japanese character issue

Warranty Claiming has the option to perform a PrintPDF. Selecting this option will print the claim information on a PDF. For the Japanese character set on SQL2016, some characters were not shown on the PDF print. This has now been resolved.

### Service Hub

#### (WCM-4920) Flex field pop up UI Update

The pop up window that allows the definition of a Flex field has been updated to reflect the new UI.

### iWarranty

#### (WCM-3660) Customer Address Retrieval, Claim Two Step Process Service and Claim Service)(g)

An update has been made to ensure the correct customer retrieval is being shown correctly. Customer details were not being retrieved from claim but from the registration details, so if there was an address change the details were not being pulled correctly as they were at the time of Warranty Claim processing. This only applied when the Two Claim Step process is active.

#### (WCM-4815) Supplier Claim Package Proration Amount Retained

When changing the status on a Supplier Claim to Cancelled after the Supplier Claim package has been Approved with Adjustments the prorated amounts are lost on screen. This caused confusion on screen and also created an issue on the data warehouse. This has now been resolved and the proration amount is now retained under that scenario.

#### (WCM-4948) RMA should not default the Received date to current date on creation

When creating an RMA the Shipped date and Received date was being defaulted to the current date. This would then not force the user to enter a date when the RMA was actually shipped. Therefore on creation of the RMA the Shipped date is auto-populated however the Received date won't be auto-populated.

### iService

#### (WCM-4950) Technician Certification not able to be saved

Where a Technician Certificate was being added and the user clicked on Save the record indicated a successful save, due to all validation being successful, however the certificate ID was not retained. This has now been corrected.