RELEASE NOTES
Reference Guide

PTC Warranty
Version 5.5 F000

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Overview

PTC is excited to announce the latest release of PTC Warranty. This release contains new functions, lots of process improvements and application fixes. This document outlines what was delivered as part of this release.

Service Intelligence installation is now available, Release 12 of IBM Cognos. This is available as a download but on separate request due to Cognos licensing for the Cognos Workspace and Cognos Workspace Advanced modules.

Installation instructions for both are available in their respective downloaded files.

PTC Warranty documentation is available in English, however, can be shown in any language as long as the translation is defined.

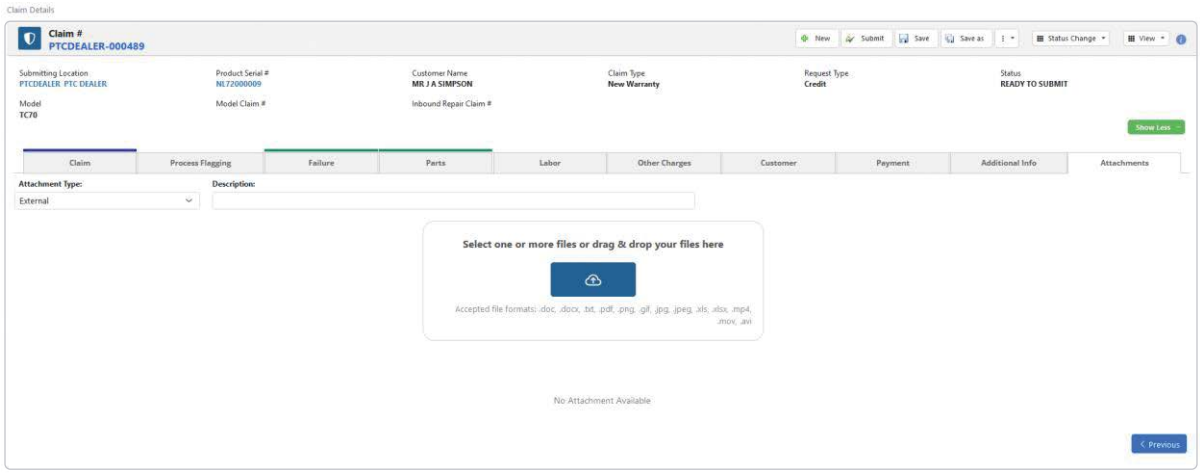
The following languages are setup within PTC Warranty, and any definition can be altered to suit the business terminology:

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

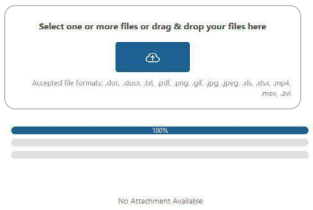
New Features

Drag and Drop Feature (System Wide Where Attachments Used)

Previously, attachments to Claims or any other screens used to be one file at a time. Within this new release, drag and drop has been added to allow multiple files to be attached at a given time.

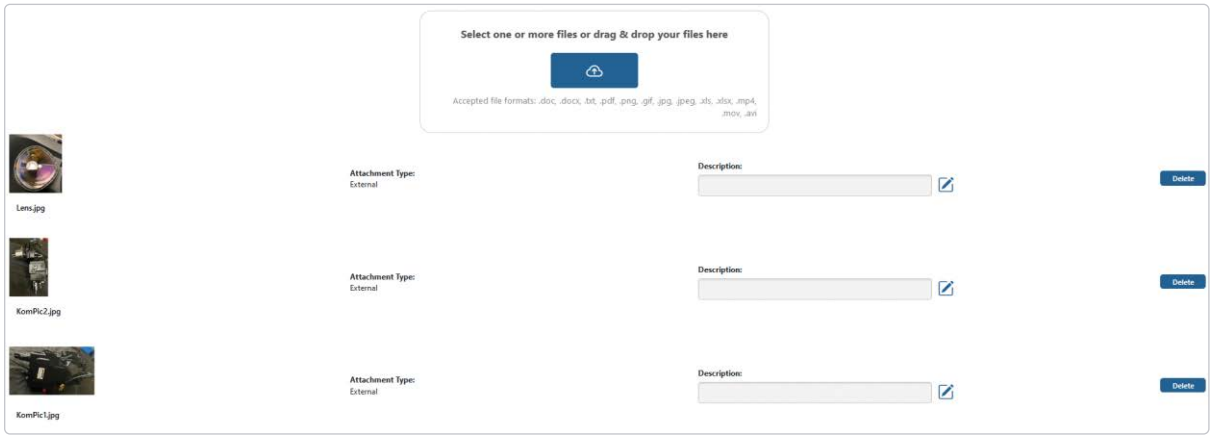


Clicking the upload button opens a file selector, the user then selects the files required and clicks Open.



OR the user can select the attachments required from an already opened file explorer window, click on the files, then drag them over the designated area (within the box) and release the mouse button.

Progress bars will appear for each file. Once loaded, the page will refresh and show the attachments. As before, the user must click on save for the files to be saved.



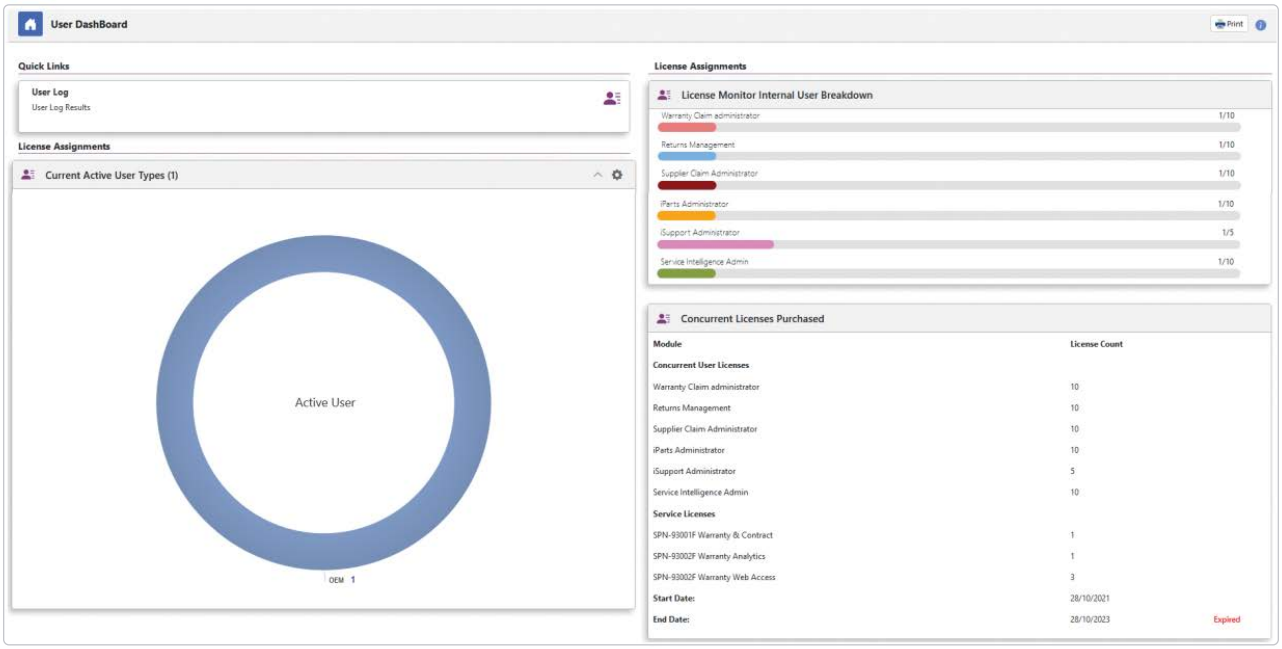
Editing of the file description can also be performed by clicking the edit icon

Administrator Dashboard

A new administrator dashboard has been created to display PTC Warranty usage by module.

The dashboard consists of:

- **User log** button. An existing function that shows when a user has logged in and out.
- **Concurrent User Type** graph that shows the breakup of all users currently logged on by organization type.
- **User Breakdown** shows the licence allocation for each module among all users currently logged in. Every time a user signs on and off, these counts are adjusted. Example: for Warranty Claim Administrator, out of 10 available licences, one licence is currently in use. When the user signs off, this number is reduced accordingly.



The start and end dates show the validity period of your licensing. In the example above, the licensing for PTC Warranty has expired.

New Look for Release 5.5 with Configurable Forms

The Product Registration and RMA forms can be configured based on your organization's needs. For example, if there is a non-mandatory field on screen that you won't use, it can be configured to be hidden.

Implementation of Cache Busting

After a software update, the browser was using cached versions of certain files that were no longer compatible with the rest of the application. This could cause JavaScript errors and User Interface becoming mis-jointed. New processing has been implemented to force the browser to reload these files when needed.

Cross Site Scripting Protection Using Nonces

Implementation of a security process to generate a random number at runtime for every script tag. This is to prevent malicious scripts from being run on the pages.

Tech Stack Upgrades

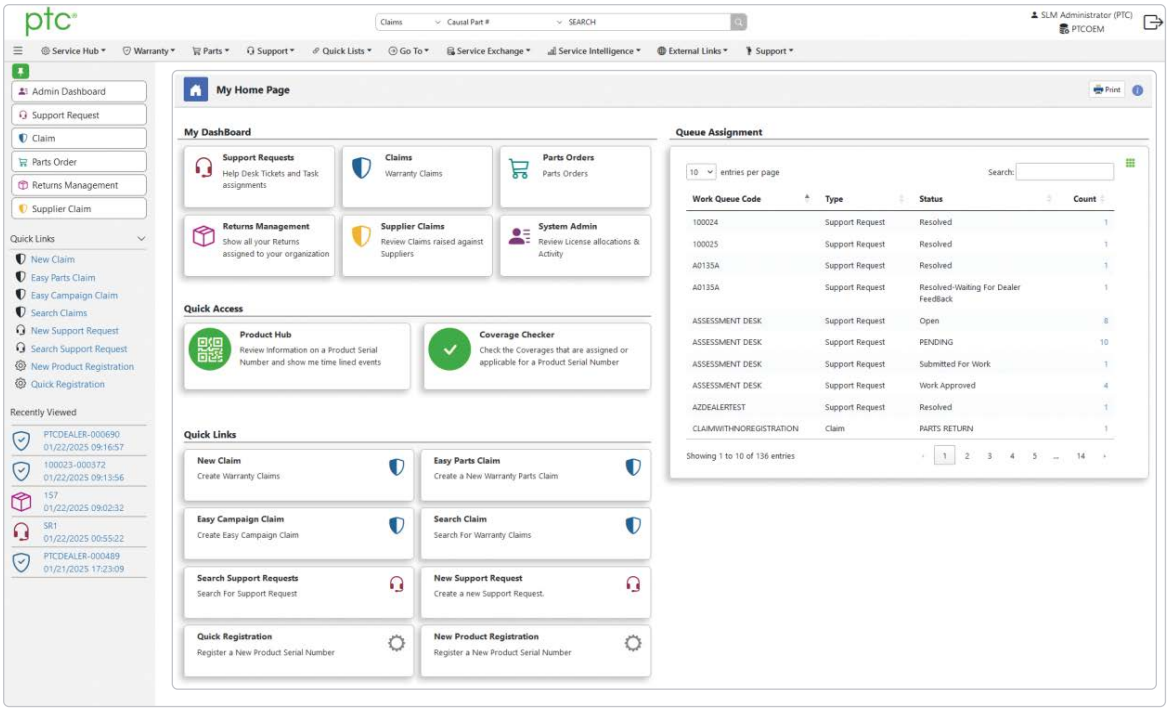
Upgrade of Bootstrap

PTC Warranty has now upgraded the Bootstrap library from version 3 to version 5. This uplifted and improved the responsiveness of screens, navigation bars, lookups and dropdowns.

Product Improvements

Core User Interface Uplift: Function Menu, User Toggle and Home Page

The left-hand toggle menu has had the following uplifts:



The Function menu now has icons for each Module area. As with previous versions, they work the same way but with new icons to represent each module.

The screen's visual appearance has been significantly improved, giving it a more modern and sleeker look.

On the left-hand toggle menu:

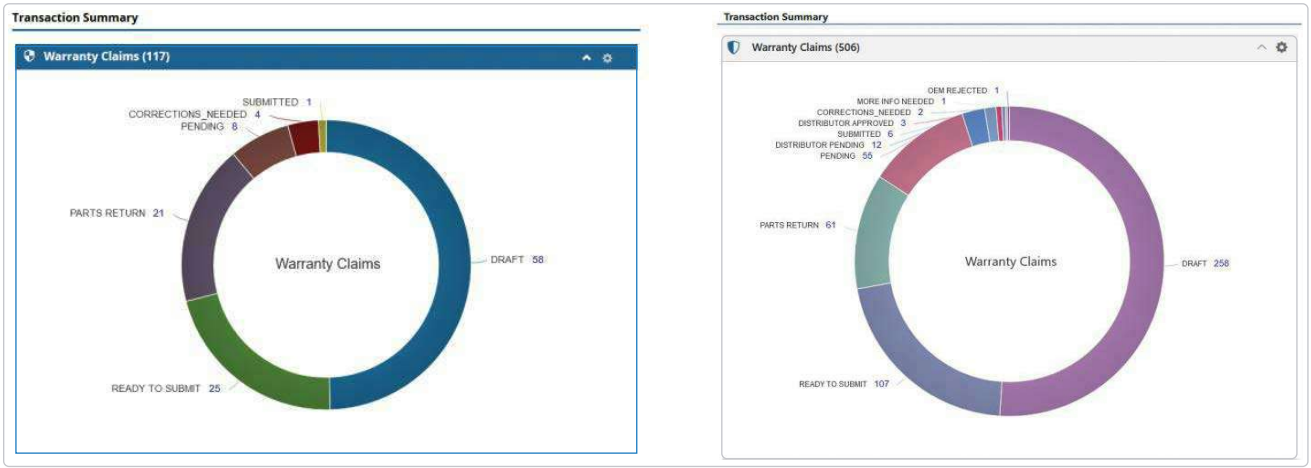
a. **Pin:** Where the pin function was in place to retain the menu on screen, each page transition would cause a slide in animation of the menu. This animation has been removed to ensure a clean transition between the pages.
b. **Dashboard Selection:** These buttons are much larger now and represented on screen in a blended manner. Icons are now used on the Function Bar, Quick Links and Recently Visited sections, and have been made sharper.
c. **Quick Links** section is now collapsable.
d. **Recently Viewed:** The entire section header is now clickable instead of just the text area.

Update of all Dashboard Charts

The charts within each of the Dashboards have had two alterations:

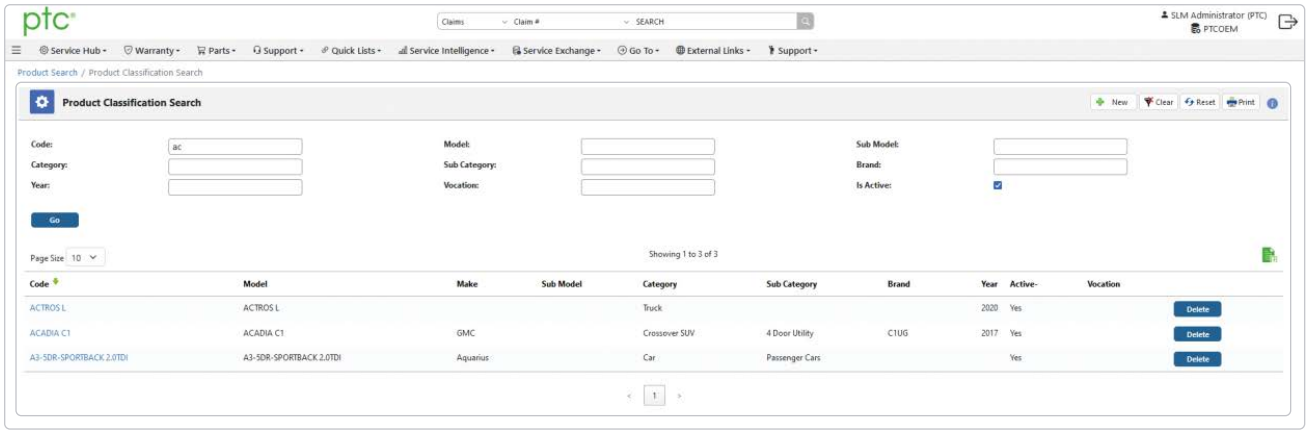
- A revision of the way that the charts are built and displayed on screen, making them more efficient.
- Default coloring of the sections made more subtle.

In prior versions, the coloring was bolder whereas in 5.5, a more subtle color palette has been applied. The image on the left is from 5.4 and the image on the right is from 5.5.



Search Screen Facelift & Update of Data Paging Method

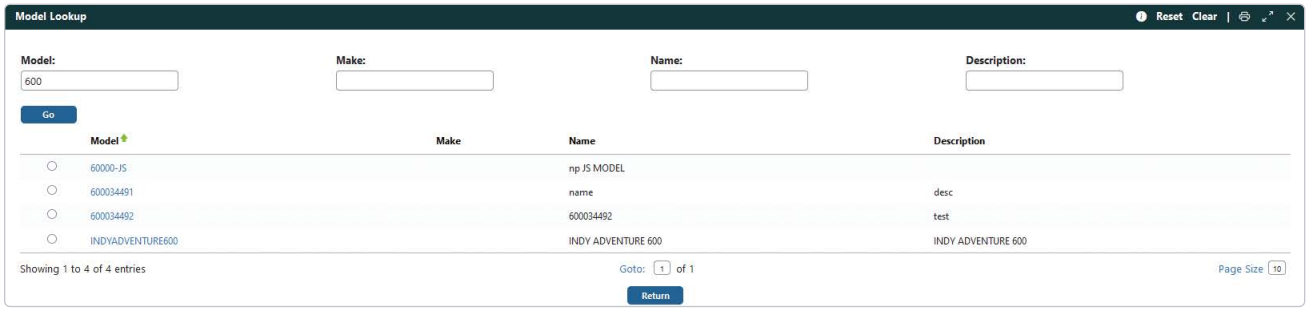
All search screens within PTC Warranty have had a facelift and an update to the way that data is presented on the screen.



Scrolling on the lower part of the screen will retain the search parameters, data pagination has been moved to under the 'Go' button and downloading of the results has been moved to the opposite side of the page. Page skipping is now numbered instead of First, Last, Next etc.

Revised Lookup Search Screens

Popups are used through the application for certain functions- the lookup of certain codes or models, for example. These windows have been updated to compliment the uplifted UI.



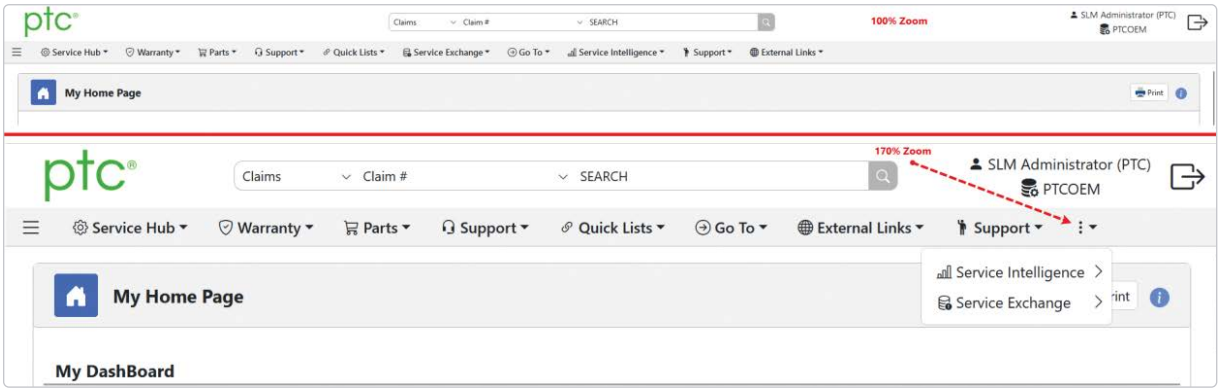
Action buttons have now been moved to the upper title bar, and the screen ID, that was previously shown in the popup, has now been placed under the information icon (ⓘ). This icon can be shown or hidden by simply updating the **DisplayScreenIdIcon** setting within the CLM Application Parameter list.

The new window format has been applied across the whole of PTC Warranty.

Auto Resizing of the Screen & Adjustment of the Function Bar

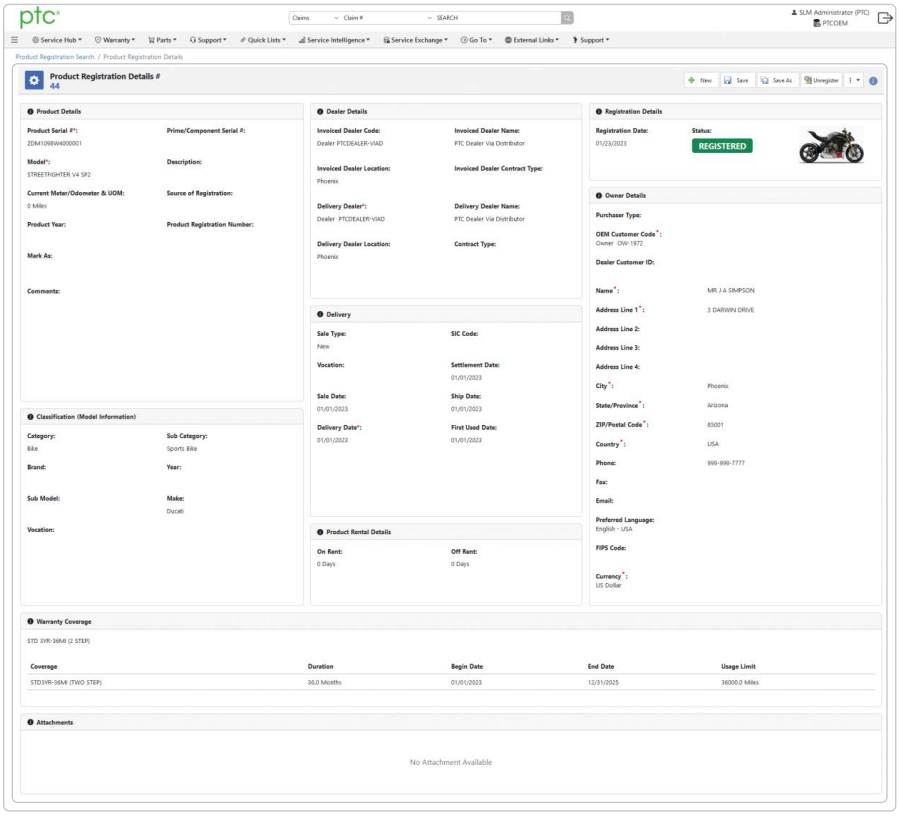
Release 5.4 saw an update to the users' landing page when they signed in. This has been further enhanced in 5.5 with the update to Bootstrap 5. When the screen is resized, the card elements are now cascaded to fit in the available space, making screen handling on smaller screens more manageable.

The action bar is also resized according to the zoom level. If it does not fit on the page, the items that don't fit are placed under the ellipsis menu, improving screen handling and presentation to the user.



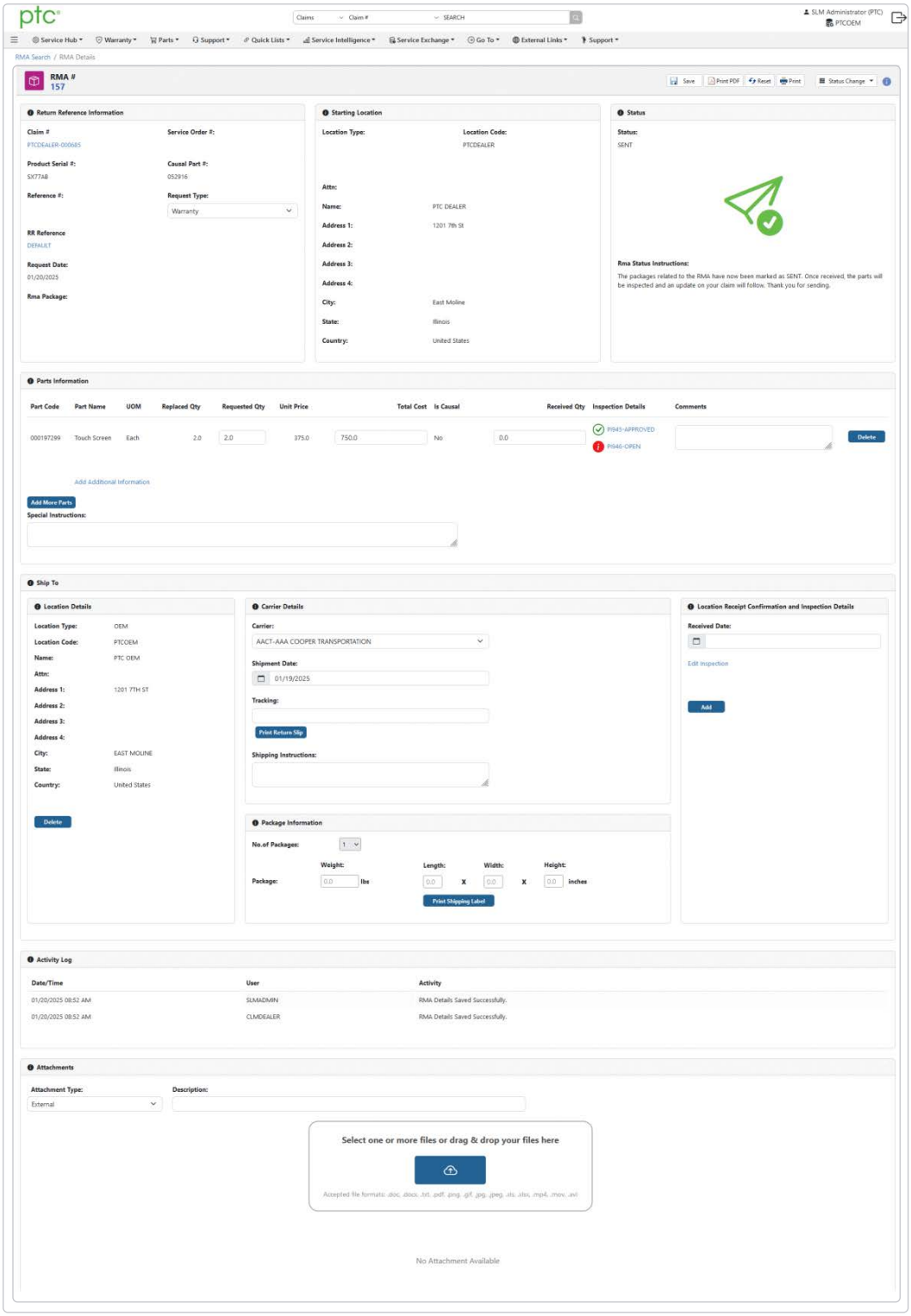
New Product Registration Screen

The Product Registration screen is one of the first to feature enhancements that allow for easier configuration of fields. Below is the new format that will being applied across the whole of PTC Warranty.



New RMA Screen

The RMA screen is also one of the first to feature enhancements that allow for easier configuration of fields. Below is the new format that will being applied across the whole of PTC Warranty.

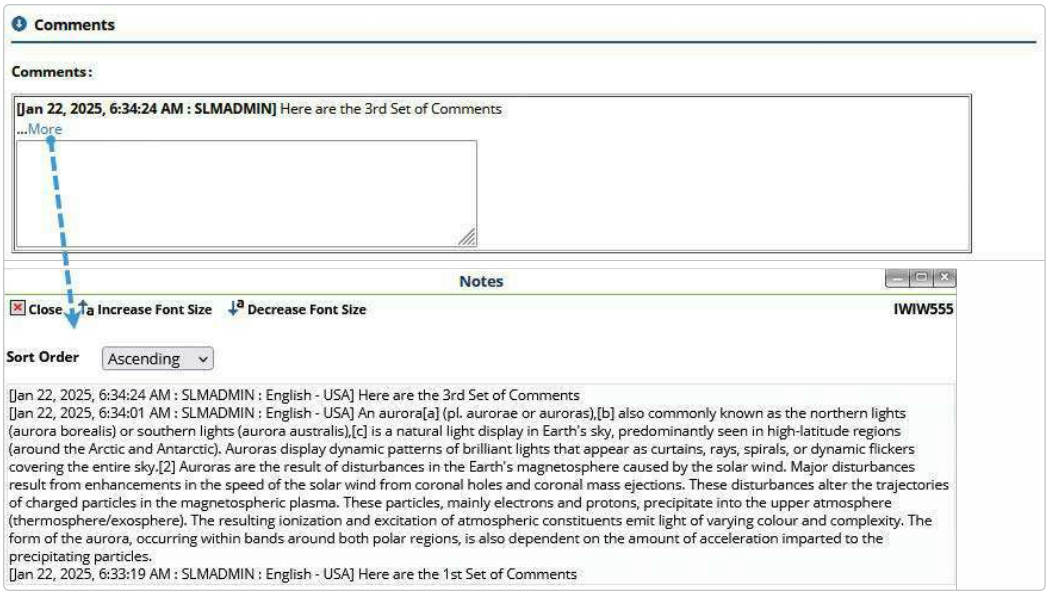


Claim Comments View

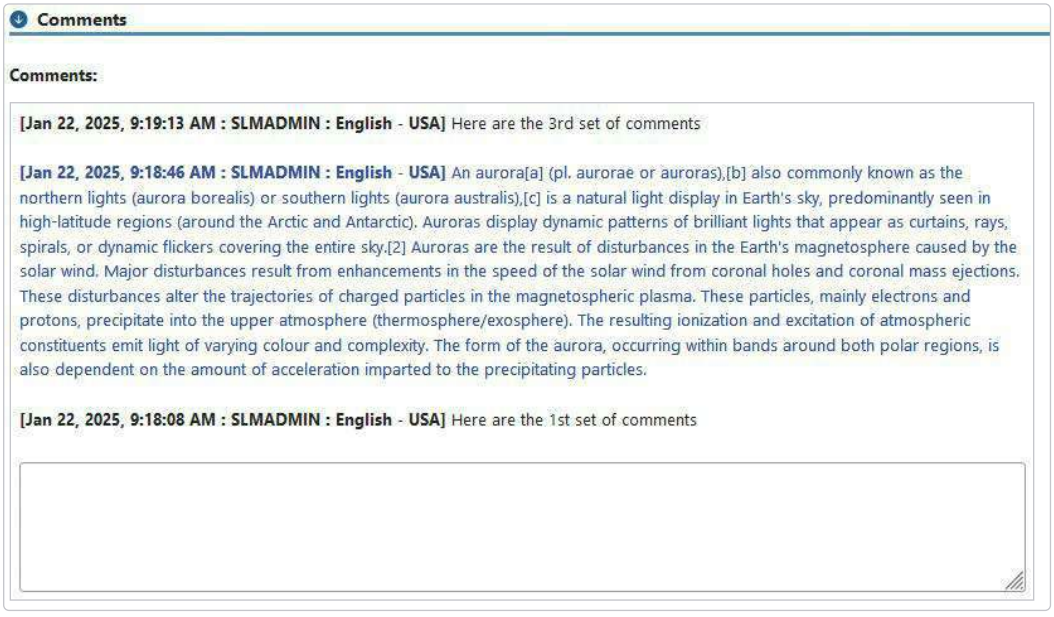
In previous versions of PTC Warranty, comments associated with claims and other screens only showed the most recent comments made. The user had to click on 'More' to see all comments.

In release 5.5, users will now see all comments listed in the main claims section of the claims screen. Additionally, to improve readability, alternate comment coloring has been implemented.

For 5.4:



For 5.5:



Copying of Transactional Reference Numbers for all Related Screens

Within the prior release, transactional headers were updated to make the transaction reference number easier to read and to allow these numbers to be copied to the clipboard with a single click. The copying was only enabled from the claim screens.

Release 5.5 has been changed to allow copying of the transactional code from anywhere where this format is used.

Dealer Claim Anchor Points (Parts, Labor & Other Charge Sections)

New anchor points have been added to the dealer claim screen. If the user adds a new part, labor code or other charge, then the screen will remain in the same section. The user will no longer see the screen jump to the top of the page unless save is selected.

Addition of Hyperlink on the RMA Inspection Forms

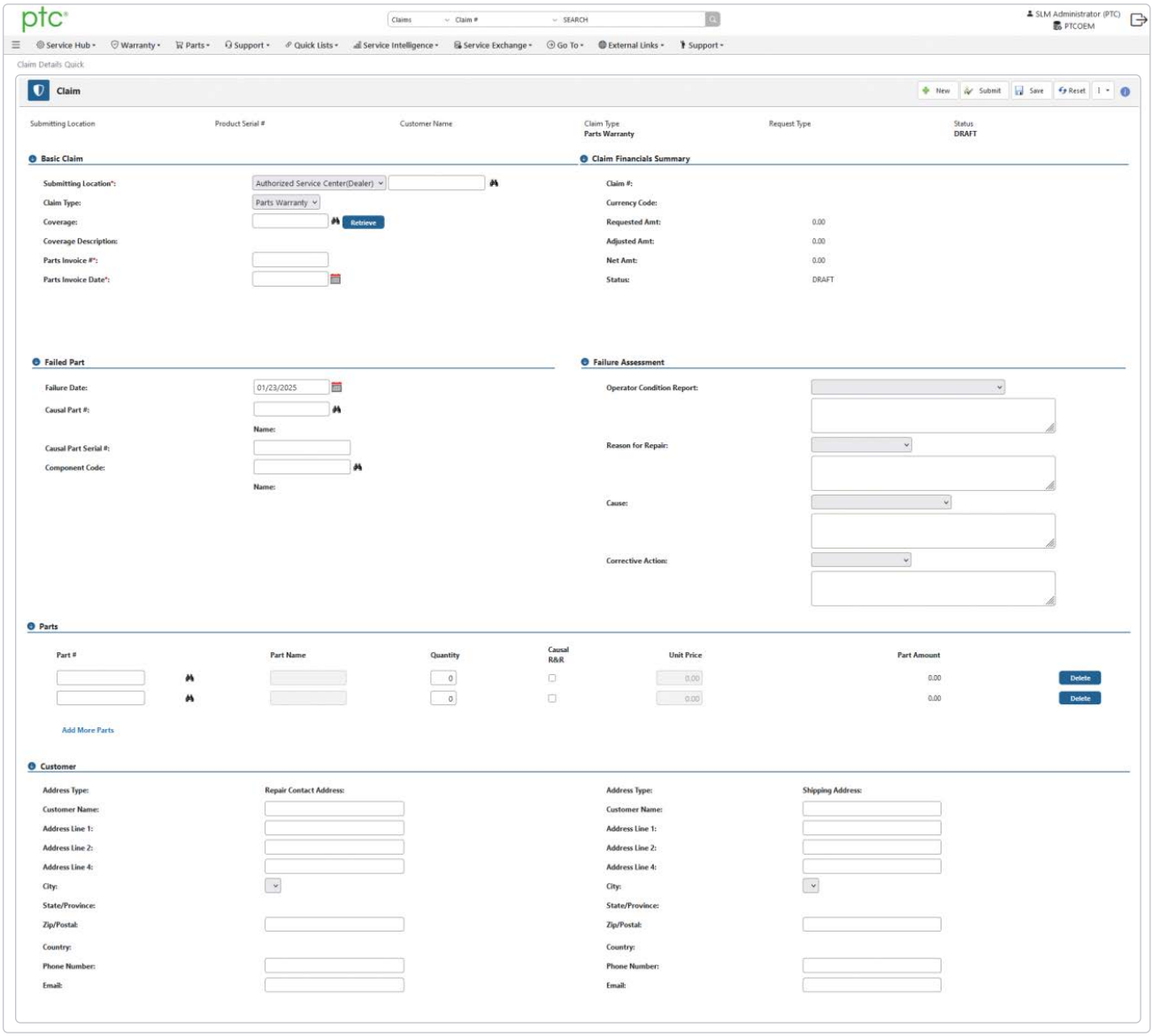
The Inspection form contains a reference to the RMA number to which it relates. Previously, this reference was a simple text value; however, it has now been changed to a hyperlink to facilitate the navigation back to the RMA screen.

Tread Component Code added to Admin Lite View

Tread Component Code was not available on the Admin Lite Claim view, failure section, but was shown on the Full and Tabbed Views. For release 5.5, Tread Component Code has now been added to the Admin Lite View screen.

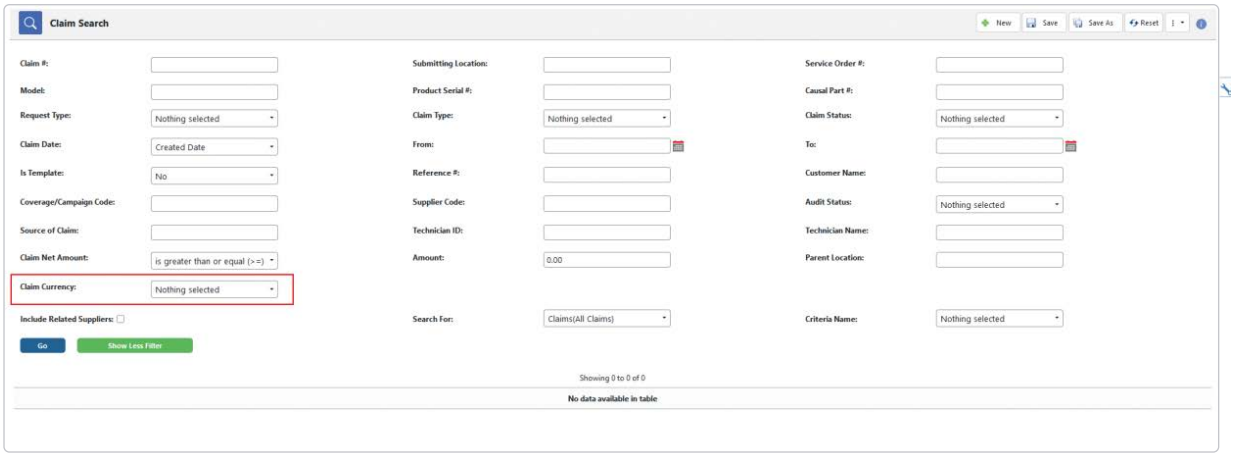
Easy Parts and Campaign Claim Function UI update

The Easy Parts and Easy Campaign screen UI was updated to be aligned with the current claim screen.

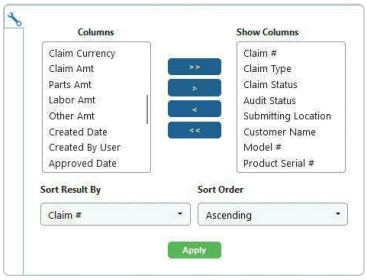


Currency Code added to the Claim Search Screen

Claim Search has been updated to include Claim Currency. This allows the search to be refined by filtering on currencies, which is particularly useful for multi-currency organizations. See below.

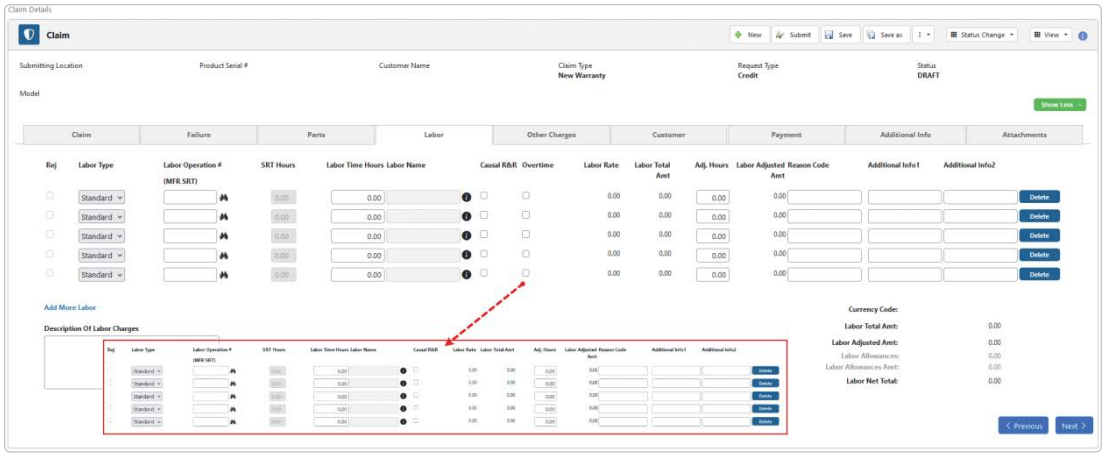


Claim Currency has also been added to the sorting filter as shown opposite.



Control Over the Use of Labor Overtime Rates

A new CLM Application Parameter has been added to allow Labor Overtime Rates to be shown or hidden, depending on their applicability within the organization.

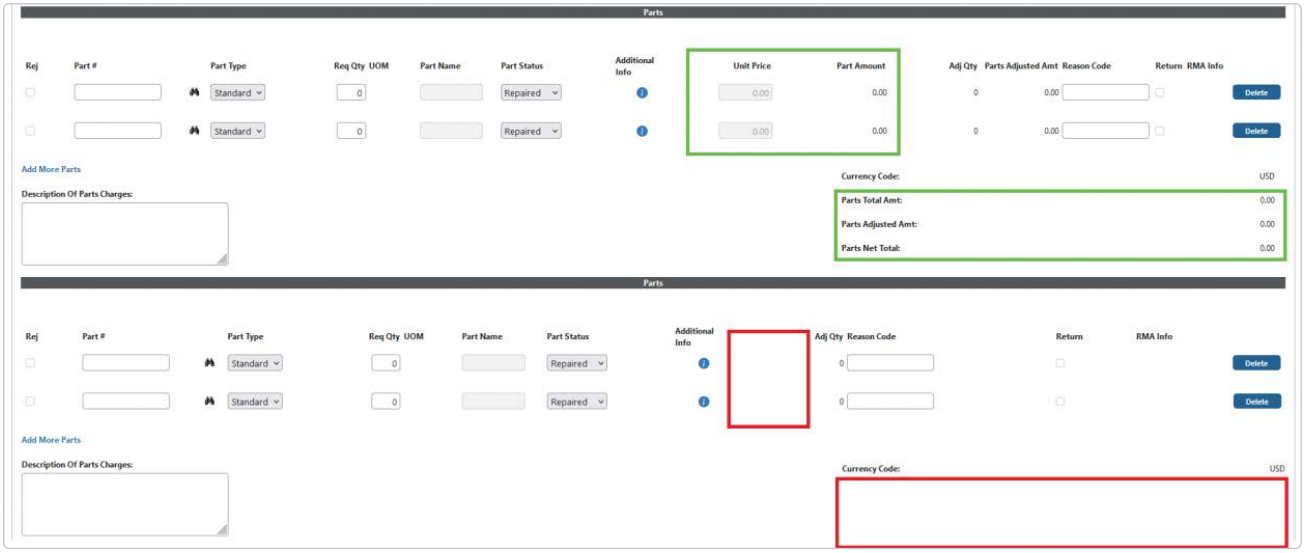


The Labor Rate screen will also hide this value if not used. If prior entries have Overtime Rates, they will not be shown and cannot be selected on the claim.

The new parameter is **ShowLaborRateOvertime**. The default is 'PTC', but it will need to be adjusted to match the customer's organization provider code.

Hiding of Part Amounts for Dealer Lite View

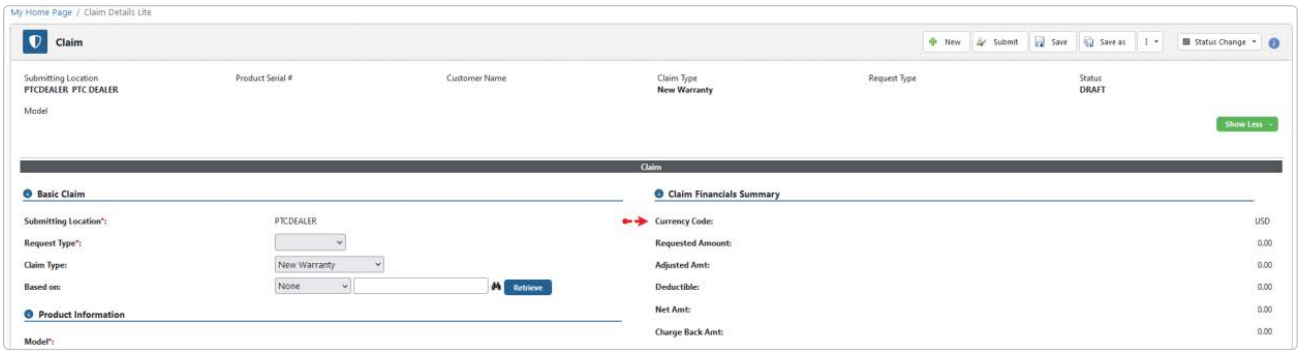
A new CLM Application Parameter has been added to hide the Part Line and Total Amounts on the Dealer Lite View.



At the top of the page are the claim totals. Part Totals are hidden here when the flag is set to true. The parameter is **HideandexcludePartPriceForDealerLiteView**. Default is false.

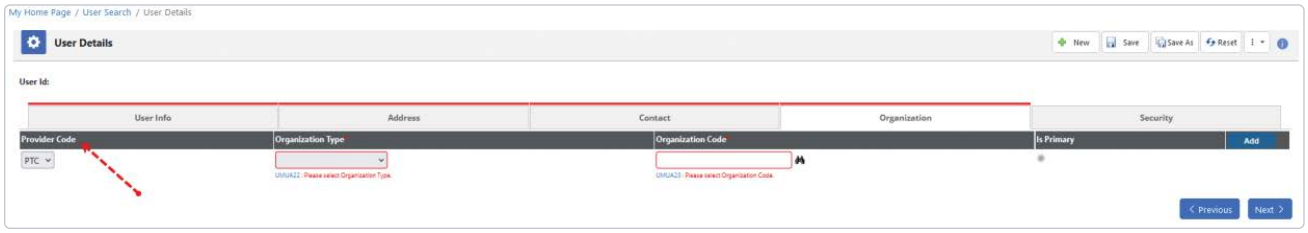
Addition of Currency Code Within the Dealer Claim Lite View

The Dealer Currency Code has now been added to the Dealer Lite View.



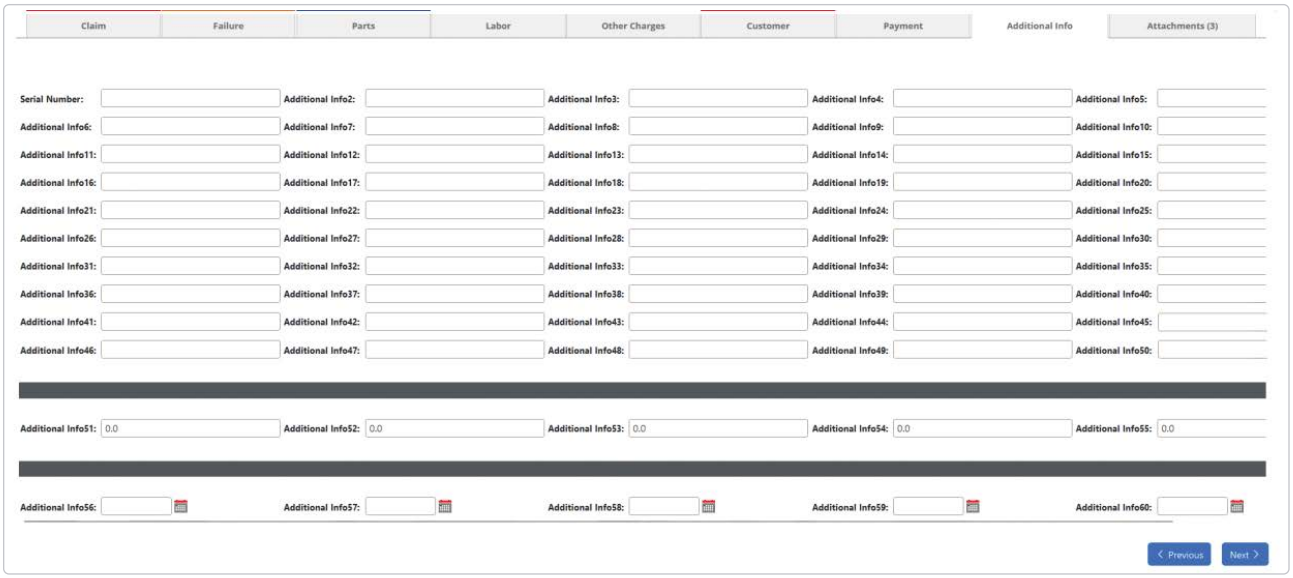
Label Renamed within the User Maintenance

Within the Organization tab of the user maintenance function, an old term was used which has now been updated. The screen tag has been altered from Scope to Provider.



Additional Info Fields Relating to Model Claim & Model Claim Template

An alteration has been made to the batch interface process of the Model Claim template. The Model Claim now includes Additional Information fields 1 to 60. This information can now be included and found on the claim tab as shown here:



Login Page Image Normalization

Within PTC Warranty, when single sign-on is not configured, administrators have the ability to control the images shown when the user is asked to sign on. If the screen is resized, the images for the carousel and corporate logo would appear stretched.

For release 5.5, this has been adjusted so that the image is not distorted but resized accordingly. The shading on the sides of the carousel images has also been removed, as it was causing the image to appear less sharp.

Product Fixes Applied to This Release

Claim Figures Altered Every Time Save Selected

When working with a language that uses a comma as the decimal separator instead of a dot, the totals calculated would change on their own on each save operation.

The affected tabs were Parts and Other Charges. Labor tab was not affected. This has now been resolved and the total value will not be correct after each save.

Contract Search Within Goto Menu Error Handling Correction

When a search was performed using an invalid contract number, a message is shown to advise the user that no information was found. The error message was improperly shown at the top of the screen instead of at the field level. This has now been aligned with how other error messages are handled.

Goodwill Totals not Getting Updated Correctly if the Cursor Repositioned

On the creation of a Goodwill, Parts Labor and Other charges are entered to outline how much the repair will cost.

In some cases, depending on the way you interacted with the form, the combined total was not being calculated correctly. This has now been corrected.

Default Component Supplier Being Used from Prior 'Save As' Claim

When using 'Save As' on a claim, certain values from the Originating Claim are copied to the new Claim. The Component Supplier value was being carried over to the new claim and it was not allowing the user change its value in the new Claim.

The Component Supplier is no longer carried over but is now re-determined based on the other claim attributes. The user can then select a new supplier if required.

Product Rental Maintenance UI Coloration

Part of the results header was colored according to a very old version of the UI. This has now been updated to blend into the current UI setup.

Claim Chargeback UI Alignment

Once a claim has been approved, the Chargeback tab is shown to the internal user groups. The Chargeback feature allows the claim to be 'charged back' to the repair location if it is determined that the claim was paid in error or if part of the claim needs to be rejected.

The Chargeback section headers and totals were slightly misaligned, and the font appeared different from the rest of the screen. These display issues have been fixed. The screen's functionality was not affected.

Parts Catalog Screen Re-alignment

The Parts Catalog screen had an overlap between the product image and textural elements. These have now been realigned.

Unexpected Rule Triggered on Easy Parts Claim

The validation rules on the Easy Parts Warranty Claim screen have been updated to no longer require the Replacement Serial Number to be populated when there is NO or an Unknown Product Serial listed. The rule that triggered the error message ('ECE2011: Please select Failed Part S/N.') was incorrect. This issue has been resolved.

Action Bar Buttons go Missing on Language Change

New, Submit, Save and Save As buttons were not visible when using a language other than UK or US English. This has now been corrected.

Selection From Track & Trace on the Support Dashboard Directs to Claims

When selecting a Support Ticket within the Track and Trace Graph, the user was taken to the claim search. This has been resolved and the user is now taken to the Support Search screen.

Error Message ECE2000 Reworded and Field in Error Highlighted Correctly

An error on the RMA screen was being displayed under a SENT status. An alteration has been made to error code ECE2000 to read "Part Number is marked as serialized. Additional information needed for one or some parts."

An update to the Serial Number field on the RMA has been applied so that when ECE2000 is triggered, the field is highlighted correctly.

RMA Comments Field Length

On the RMA screen, the comment box for the disposition line caused an error (code IWX841) and prevented a successful save if the comment entered was longer than 30 characters. This has now been resolved.

Login Page Maintenance Missing UI Tag

The Login Page Maintenance screen allows administrators to define colors and images for the login page. The name of this screen was not defined correctly, displaying the UI tag ID instead. This affected the screen header and the breadcrumb trail. This issue has now been corrected.

Warranty Campaign UI Tag missing Mandatory Asterisk

When a Warranty Claim Type of Campaign is selected, there was an '*' missed off the UI Tag to indicate a mandatory value. Update applied.

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