1.1 How to Get Help

Who Can Request Support?

Support is provided on a named-user basis to individuals who have completed OpenClinica Super User Training. Your contract specifies the number of supported users allowed. You can add additional supported users as needed.

 Note: The number of supported users does not limit the total number of users in your OpenClinica system.

Access the Support Portal

To Access the OpenClinica Support Team (Contract-Based, Named Users Only):

1. Open the **User** menu.
2. Select **Support.** The **Support Portal** appears. You must log into the **Support Portal** separately from **OpenClinica**.
3. Choose on the the following options:
    - **Create Request**
    - **View Request**
    - **Email Support**
    - **Regulatory Resources** button to go to **OpenClinica's** documentation site and view information on **Regulatory Resources**.

Tips for Submitting a Support Ticket

Provide detailed information to help the Support Team resolve your issue efficiently.

 Tip: To keep things organized, please create one ticket per issue. If you want to submit multiple issues, please create a separate ticket for each.

Here is some information that might be helpful to include in your description of the problem:

- The date and time when you first encountered the issue
- The username(s) of the user(s) who encountered and/or are affected by this issue
- Whether the problem occurred in Test or Production, or both
- The version of the software you are using
- A description of the problem with steps on how to reproduce
- Whether or not the issue can be reproduced for other sites, participants, browsers, etc.
- Whether you attempted a work-around; if so, what was it and what was the result?
- The study name
- The forms (If you uploaded the Form with the Form Definition Spreadsheet, include that file)
- The rules in use
- Screenshots of the issue

Stay Informed with Updates

OpenClinica provides system updates and release communications directly within the platform.

- **Release Announcements** are shared approximately two weeks before a release and include:
  - Summary of changes
  - Screenshots
  - Occasional videos
- After the release, announcements are updated with links to full release notes.

You can also view our OC4 release notes here.

System Notification Banner

A system notification may appear at the bottom of the Study Runner to display important announcements, such as scheduled maintenance or system outages. You can dismiss it by clicking the **close (X)** icon

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Use the Resource Center

The Resource Center provides quick access to support and learning materials directly within the application. From this panel, users can:

- Access on-demand user trainings
- Navigate to the OpenClinica documentation website
- Access onboarding checklists with short training materials
- View release announcements

 Tip: Use the Resource Center as a central access point for product guidance, training resources, release updates, and additional support.

Navigate the Documentation Site

The OpenClinica documentation site is designed to help you quickly find relevant information.

To locate content:

- Click **OpenClinica 4 User Documentation** on the sidebar, and select a heading related to the information you want to find.
- Enter search terms in the Search bar in the upper left-hand corner of the screen. This includes anything on the website, including information from the User Manual and from the Self-Service Training.

 Tip: You can filter search results to show only OC4 content.

Additional Online Resources

You can access additional resources from the OpenClinica website:

- Request support
- Contact us
- Request a demo
- Check our blog
- Check us out on Youtube, LinkedIn, Twitter, or Facebook
- Register to receive access to our newsletter and free resources, such as The Ultimate eCRF Design Guide.

Thanks!

Approved for publication by Kate Lambert. Signed on 2026-04-21 4:06PM

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