

3.1 How to Get Help

Who Can Request Support?

We provide support on a named user basis to users who have completed the OpenClinica Super User Training. Your contract with us will specify how many supported users you are entitled to. Additional supported users can be added as needed. **Note:** *The number of supported users has no bearing on the number of users you can have in your OpenClinica system.*

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

1. From the **User** menu, select **Support**. The **Support Portal** appears. You must log into the **Support Portal** separately from **OpenClinica**.
2. Click the **Create Request**, **View Request**, or **Email Support** buttons, or click the **Regulatory Resources** button to go to **OpenClinica's** documentation site and view information on **Regulatory Resources**.

Updates

We provide release announcements and updates on downtime within OpenClinica through HelpScout. Release Announcements are provided two weeks prior to the release. These include brief descriptions of the changes, screenshots, and occasionally short videos. After the release, the Release Announcement is updated with a link to the full release notes. You can also view our OC4 release notes [here](#). Notifications from HelpScout appear automatically when you enter OpenClinica. If you want to see past announcements, you can click the ? icon in the lower right-hand corner of the screen. **Note:** *If the ? icon is blocking something on the screen: Zoom in (**Ctrl +** for Windows and **Command +** for Mac) with your browser until a scrollbar appears on the screen . Then scroll down until the ? (help) button is no longer blocking the content you want to view. Or Zoom out (**Ctrl -** for Windows and **Command -** for Mac) with your browser until the screen size adjusts so that the ? (help) button is no longer blocking the content you want to view.*

The Doc Site

Our goal is to provide information that is easy to find and understand on this website. To find information, you can:

- Click [OC4 User Manual](#) on the sidebar, and select a heading related to the information you want to find.
- Click Self-Service Training on the sidebar, and select the course related to the information you want to find. You will always have access to information, screenshots, videos, and quizzes, regardless of whether you have completed the training.
- 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. You can also filter search results by OC4 or OC3.

Resources on Our 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](#).

Tips for Submitting a Ticket

The more information we have, the more likely we will be able to quickly diagnose and resolve your issues. 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

Thanks!

Approved for publication by Kerry Tamm. Signed on 2020-12-17 3:59PM

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