



# 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.

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## 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

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## 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.

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## 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.

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## 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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