

# OpenText online support has become a whole lot smarter.

Introducing the new OpenText My Support Portal

**opentext™**

**Smarter with OpenText**



# Smarter support, designed for you

Over our 25+ years as a leader in information management, OpenText customers have continually demanded the very best in technical support and customer service, which we are pleased to provide through one all-important resource—the OpenText My Support Portal. This single digital platform delivers a consistent online experience across product lines and connects end-to-end solutions.

If you are new to OpenText, you can expect to receive quality support from a talented and dedicated team that reaches completely around the globe. You will have powerful self-service resources, access to a community of peers and experts, and our virtual agent “OTIS” to help you find answers easily and immediately.

The OpenText My Support Portal will be your gateway to knowledge, software downloads, and service. Our digital platform will allow you to manage account details and contacts, track case history and ongoing matters, find product information and downloads, , and much more.

Continue reading to learn more about the My Support Portal, including how to navigate customer support processes and manage your online account.



# Table of contents

<b>Smarter accounts</b> .....	3
Registering your My Support Portal contact profile and account(s) .....	4
Managing your preferences .....	4
Moving between linked accounts .....	5
Managing contacts associated with accounts .....	6
<b>Smarter self-help resources</b> .....	7
Searching for resources in the knowledge base .....	8
Working with OTIS, the Virtual Agent .....	9
Participating in community forums .....	10
<b>Smarter case management</b> .....	12
Opening a new case with customer support .....	13
Viewing and managing your cases .....	13
<b>Smarter help</b> .....	14
Finding more information in the knowledge base .....	14
Contact us .....	14

# Smarter accounts

Your experience within the My Support Portal is tied directly to your account(s), product(s), and service(s). We want to ensure that you are only getting information relevant to you and your business, personalizing your digital experience as much as possible.

For example, if you only own one OpenText solution, your My Support Portal experience will be limited to resources that are relevant to that one solution. If you have more than one OpenText product, your experience will expand.

Additionally, some customers have multiple accounts. To help distinguish your individual online account from one or more business accounts, OpenText refers to your individual sign-in identity as your "contact profile." Business accounts tied to contracts and software maintenance are referred to as "accounts."

It is important to provide as much detail as you can when you activate your My Support Portal contact profile and business accounts. Keep information in your accounts up to date over time to help ensure your My Support Portal experience is tailored to you.



## Registering your My Support Portal contact profile and account(s)

To get started with the My Support Portal, you will need to register your individual online presence (contact profile) and business account(s). The registration process is easy; simply follow the link below, complete the form, and follow the instructions that will be sent to you by email.

[Register your My Support Portal profile and/or account](#)

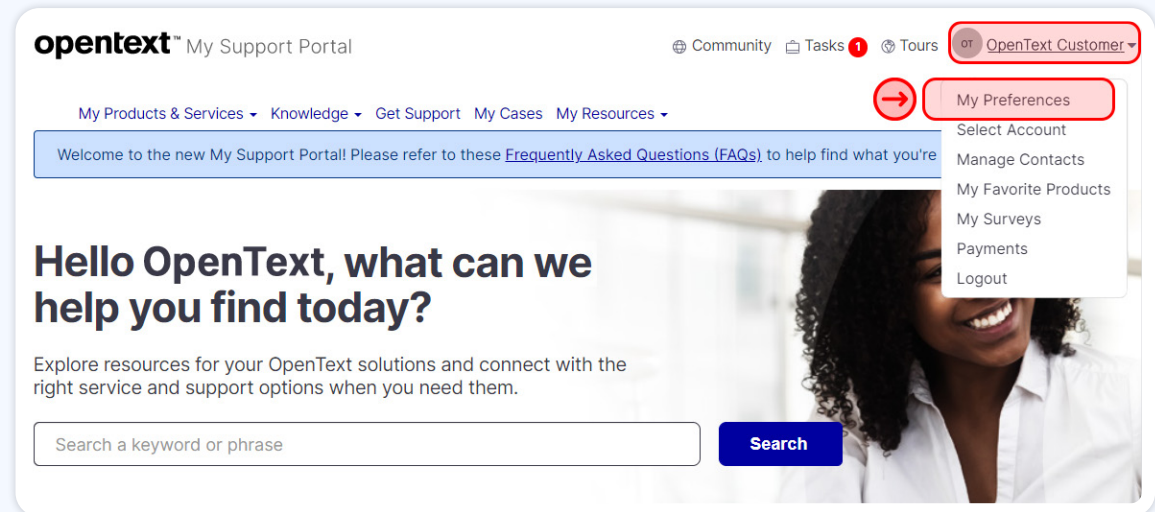
**Note:** If you are a customer of a product line that has been recently acquired by OpenText, or if you have spoken with an OpenText Customer Service representative about setting up a My Support Portal profile, you may have already received an email invitation from [noreply@cloud.opentext.com](mailto:noreply@cloud.opentext.com) to activate your account. If you have already completed your activation via that email, there is no further action required; you are ready to sign in at <https://support.opentext.com>.

In addition to granting you access to the My Support Portal, your activated account will allow you to sign in to other OpenText online services you are entitled to, such as Training, Communities, ePay, and more.

Read our [FAQ](#) for more information about My Support Portal accounts

## Managing your preferences

Once you sign in to the My Support Portal, you can manage your profile and basic account preferences: Click on your name in the top-right corner of any My Support Portal page, then click “**My Preferences**” (see below).



The screenshot shows the OpenText My Support Portal interface. At the top right, the user's name "OpenText Customer" is displayed in a dropdown menu. Below it, the "My Preferences" option is highlighted with a red box and a red arrow. The main content area features a search bar with the placeholder text "Search a keyword or phrase" and a blue "Search" button. The background image shows a smiling woman with curly hair.

On the **My Preferences** page, you will be able to update basic profile information that will help OpenText customer support contact you. You can also choose which events prompt email notifications by toggling the on/off switches under **Notification preferences**.

## Moving between linked accounts

It is possible to have more than one business account linked to your My Support Portal contact profile. To see what accounts are linked to your contact profile, click on **“My Preferences”** in the contact menu located in the top-right corner of any My Support Portal page.

At the bottom of the **My Preferences** page, you may see a **Linked accounts** section that looks like this:

Account name	Account number	Responsibility
<a href="#">ACME Corporation</a>	XXXXXXXX	Non-Admin
<a href="#">ACME Corporation NM</a>	XXXXXXXX	Non-Admin
<a href="#">Wile E. Industries</a>	XXXXXXXX	Admin

All accounts associated with your contact profile should appear in this list. If there is anything missing, contact your administrator for access to the account(s). Or, if you are the administrator, contact customer support.<sup>1</sup>

Everything that appears within the My Support Portal is based on the account you are using at any given time, and the product(s) associated with that account. **You can only be signed in to one account at a time.**

You can switch accounts in two different ways. The first is to go to the **My Preferences** page and click on a linked account as shown in the screenshot above. The second is to click **“Select Account”** in the contact menu located in the top-right corner of any My Support Portal page. In both cases, a pop-up window with dropdown menu will appear, from which you can select the account you want to use.

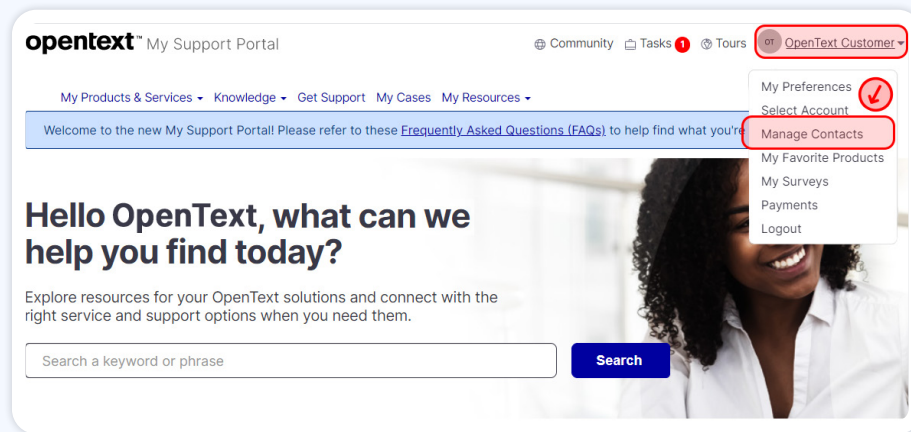
Once you have selected an account, the My Support Portal resources for all products and services associated with that account will be available to access.

<sup>1</sup>Information on how to contact customer support within the My Support Portal can be found further in this document: [Smarter case management](#)

# Managing contacts associated with accounts

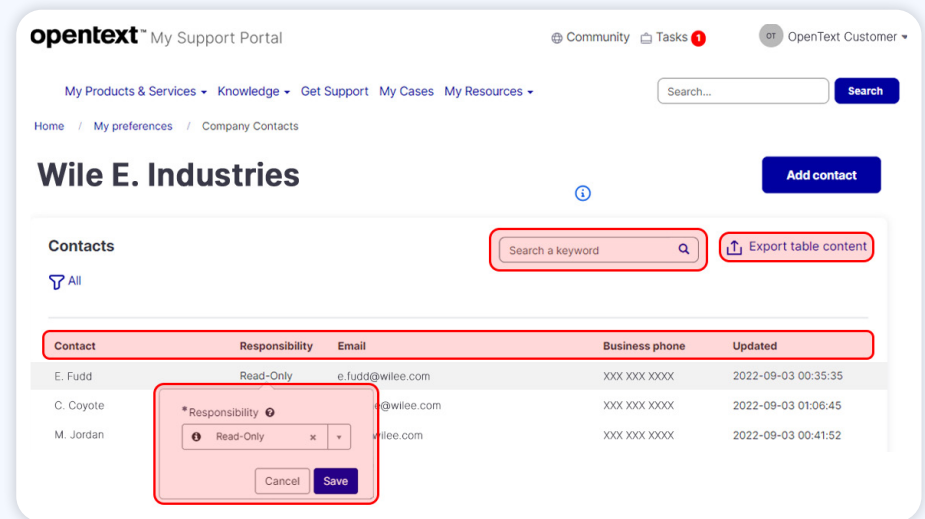
**Note: The ability to manage and remove contacts is available for customers with Administrator (Admin) access only. If you do not have Admin access, you will not be able to view or manage contacts on your account(s).**

To gain full access to available resources on the My Support Portal, contact profiles must be associated with the accounts that have the products and services relevant to each contact. To manage account contacts, click on **"Manage Contacts"** in your contact profile menu located in the top-right corner of any My Support Portal page (see below).



On the **Company Contacts** page, you will see a list of all active companies associated with your account, along with their permissions and basic contact information. You can filter contacts by sorting with any of the table headers, search for contacts from the search bar and export the list to a .CSV file (see below).

You can also change the role/permissions for each contact associated with your account(s). Click on the role listed beside a contact under the **Responsibility** column and a pop-up box will open. From the dropdown menu, select the new contact role, then click **"Save."**



# Smarter self-help resources

The OpenText My Support Portal is your primary source of product-related information, software downloads, news, and self-service help. The portal has been designed to curate content that is relevant to you and your OpenText products, and to deliver what you need in a quick and easy manner.

We believe that if one person comes to us with a question, there are many others who wonder the same. For this reason, we see every customer interaction as an opportunity to add to our extensive knowledge collection. Answers to customer questions, newly implemented processes, product enhancement requests, guidance, instructions, and more are published as knowledge artifacts and cataloged for easy access.

If you are unable to find what you are looking for by searching through our knowledge base, our Virtual Agent "OTIS" may be able to help. OTIS can locate knowledge, answer basic questions and point you in the right direction.

Finally, for help with less well-defined challenges and to crowdsource ideas, the My Support Portal Community provides a place where peers can brainstorm approaches, lend technical advice, and offer personal experiences.

No matter what you are trying to find, the My Support Portal should always be the first place you look.

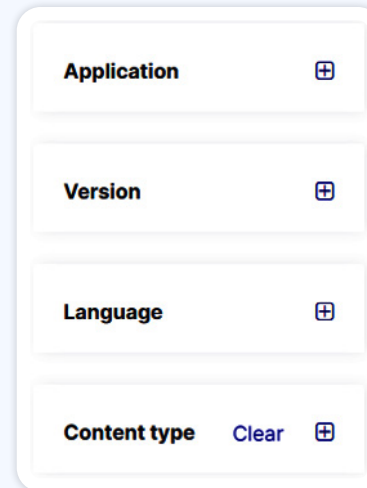
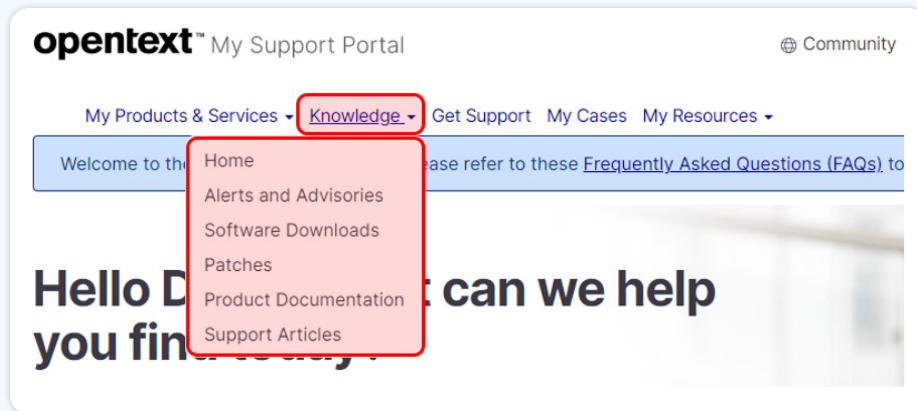




## Searching for resources in the knowledge base

Just about everything on the My Support Portal is kept and organized as Knowledge, which can be filtered by product line, application, content type, language, etc. Like everything else on the portal, the knowledge that is surfaced is unique to you.

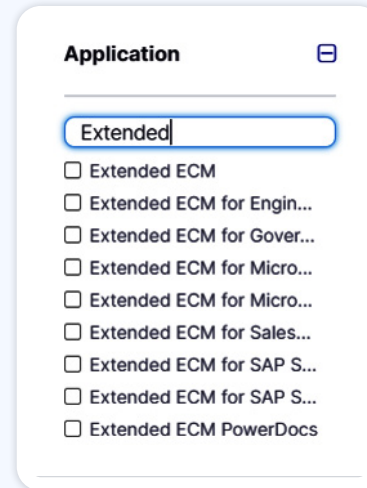
The best way to search for knowledge is to click “**Knowledge**” at the top of the page. This will open a dropdown menu with options to begin your search (see below). Click on the knowledge filter category that matches the content type you are trying to find.



You will be taken to the knowledge base search page. Here you will see some results based on your initial filter, a search bar at the top of the page, and additional filters on the left.

It is highly recommended you use the filters on the left to navigate to your content before you use the search bar, especially if you have access to many OpenText products.

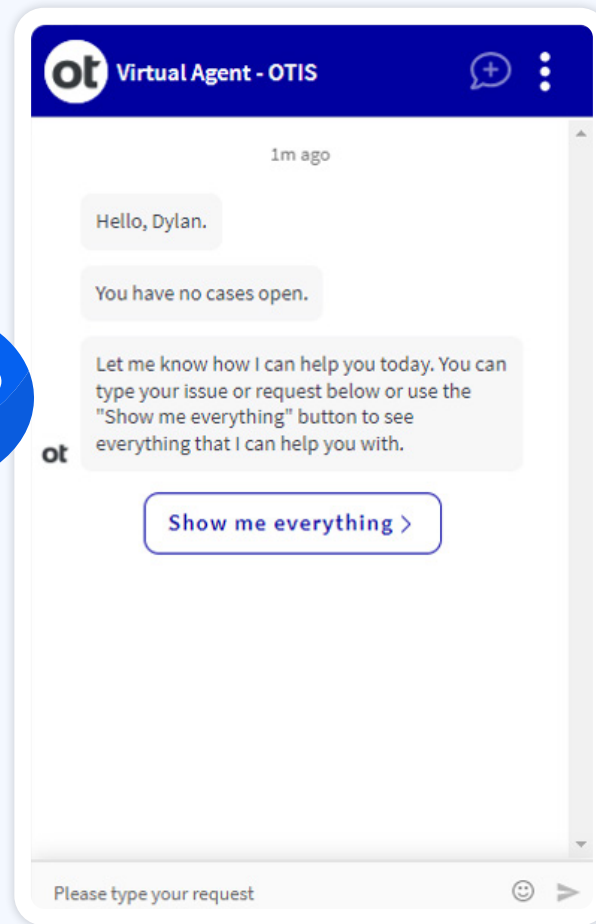
**Left: A sample of some of the filters available to you on the knowledge base search page. The filters can be expanded to available options that will narrow down search results. These options can be pared down by typing a search query into the field at the top of the expanded filter window.**



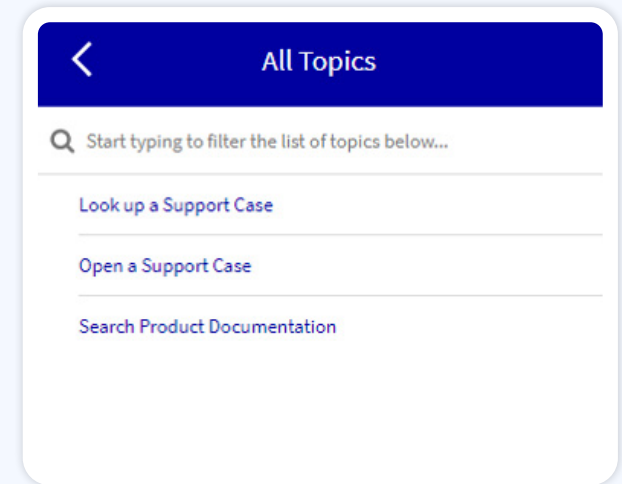
## Working with OTIS, the Virtual Agent

The Virtual Agent “OTIS” is an artificially intelligent bot equipped with information to help you navigate the My Support Portal and access the support you need.

To begin a conversation with OTIS, click on the chat icon in the bottom-right corner of any My Support Portal page. A chat window will open and OTIS will kick off the conversation with the following:



If you click “**Show me everything**” (see left), OTIS will continue to guide you through the conversation with prompts (see below). You can also ask OTIS a question straight away.



OTIS will look through your case history, knowledge base, and Community for anything that could be relevant to your query.

Once you have finished your conversation, you can close the window. You may be prompted to complete a survey to tell us how OTIS performed.

## Participating in community forums

For questions that are not answered in knowledge articles or Release Notes, the OpenText Community may be of assistance. In the community, OpenText experts and peers discuss technology, business practices, user adoption strategies, trends, use cases, and more.

You can access the community by clicking on **“Community”** from any page on the My Support Portal. You can also bookmark the community URL: [support.opentext.com/community](https://support.opentext.com/community).

On the community home page (see below), you can use the search bar to search for relevant threads, blogs, forums and other content in the community. You can also browse through community **Categories** to see what others have posted in those forums.

**Welcome to the OpenText Community.**

We provide open discussion forums for the community of employees, customers, and our partners.

Search Content, Forums, and People. (minimum 3 characters) **Search**

**Categories**

- My Support Customer Feedback
- \*Internal Testing Only\*
- AI and Analytics  
1 Sub Forum →
- Business Network  
6 Sub Forums →
- Content Services Platforms  
19 Sub Forums →
- Core Apps  
15 Sub Forums →
- Customer Experience Management  
8 Sub Forums →
- Digital Process Automation  
7 Sub Forums →

Before you participate in the forums, you may want to update your community profile to determine how other community members will see you. From the top of a **Community** page, click on **“Community,”** then **“Community Profile”** in the dropdown (see below).

opentext™ Community

← Back to My Support Portal **Community** Tours OpenText Customer

Home  
Events  
Ask a Question  
Leaderboard  
All Forums  
All Topics  
Questions to Case  
Notifications and Subscriptions  
How to Earn Points  
**Community Profile**  
My Bookmarks  
Terms and Conditions

Search Content, Forums, and People. (minimum 3 characters) **Search**

Your community profile differs from your My Support Portal contact profile; it is not attached to your cases or support account. Rather, your community profile only provides information to other community members so they can better understand who you are.

On the **My Community Profile** page, you will see everything that is visible to other community members as well as a history of your community engagements. To edit what members see, click the **“Edit profile”** button.

On the **Edit User Profile and Preferences** page, you can update all of the fields based on what you want other community members to see. The **ONLY** required field is **“Display name,”** which is what will show on your community posts and replies and does not need to be your real name. We recommend you use your first name and last name initial, but the choice is yours.

**Note: By default, your full name will appear as your community display name.**

You can control the community profile information that members see; click **“display settings”** at the top of the page and adjust the permissions within each field (see below).

Edit User Profile and Preferences

Some fields below are visible to other users based on your **display settings**. Do not include sensitive information.

Display Settings

Choose who can view your profile sections

Country	Title
Only me	Everyone after logging in
Bio	Display name
Everyone after logging in	Everyone
Phone	Company
Only me	Only me
Email	State
Only me	Only me
Photo	City
Everyone after logging in	Only me

Cancel Save

Once your community profile and preferences have been completed, click **“Save”** and return to the community home page to participate in the forums. Wander through the various forums to find content that interests you, and to find an appropriate place to begin a discussion.

Click **“Subscribe”** anywhere in the community to receive notifications on new content posted in forums or in response to existing entries. [Subscriptions and notification settings can be managed here.](#)

Quick links and more information about the OpenText Community:

- [Ask a question in the community](#)
- [View the complete list of forums](#)
- [Earn reputation points](#)
- [Review the community Terms and Conditions](#)

# Smarter case management

The My Support Portal gives you full access to your open case(s), case history, and interactions with support. By keeping everything in one place, your case details will be readily available to you and customer service agents to help make your experience more efficient.

You can also open cases within the portal, which ensures requests go directly to the experts best suited to help based on your product, preferred language, location, and the nature of your query. Portal automation will identify you, your account(s), and your product(s) more quickly, accurately, and securely than when cases are opened via email.



## Opening a new case with customer support

To help reduce the back-and-forth information gathering that can sometimes occur when first explaining a scenario, the My Support Portal has a number of contact forms. Each form will prompt you for information that is necessary for your request to be picked up as quickly as possible.

Click **“Get Support”** at the top of any My Support Portal page to go to the **Request Catalog** page. From here, you can access all of the contact forms available to you.

For questions about the My Support Portal, please use the **General My Support Inquiry** request form. This will take you to support personnel who are most experienced with the portal and your digital experience.

For technical questions, use the **Technical Support Case** or **Managed Services Technical Support Case** request forms. These will direct your request to our expert technicians.

Always ensure to include as much detail in your initial request as possible so our support representatives have the information they need to diagnose and resolve your query.

## Viewing and managing your cases

To access open and historical cases, click **“My Cases”** at the top of any My Support Portal page. You will be taken to your case history, which you can sort and search. Click on any case number to see the details of that case and manage its details.

More information about managing cases can be found in these knowledge base articles:

- [How to upload large files via SFTP](#)
- [How to accept or reject a proposed resolution](#)
- [How to close a case](#)
- [How to escalate a case](#)
- [How to request a report](#)
- [How to track feature requests and defects](#)

# Smarter help

For more information on how to navigate and use the My Support Portal, refer to these knowledge articles. New knowledge is constantly being published on the My Support Portal, so if you have questions about anything that is not listed above, browse our knowledge library here.

## Finding more information in the knowledge base

### General help

- Getting started FAQs
- How to search in the My Support Portal
- How to use virtual agent chat support
- How to reset or change your password
- How to register for a new account

### Products

- How to search for activation keys, knowledge, cases and community forums
- How to locate your product downloads and resources
- How to access downloads and patches
- How to view your products
- How to favorite a product
- How to request license keys

### Surveys

- What triggers a customer satisfaction survey?
- How to complete a case closed survey
- How to opt out of surveys

### Cases

- How to submit a support case
- How to request hardware or maintenance
- How to send large files to support
- How to close a case
- How to accept or reject a proposed resolution
- How to track feature requests and defects
- How to request a report
- How to change your support coverage
- How to contact a Sales representative
- How to escalate a case

## Contact us

Customer support has always been about more than answers to problems. We strive to empower you, give you confidence in your chosen solutions and deliver an exceptional customer experience.

If you have any questions or concerns about the My Support Portal and your new customer support experience, do not hesitate to contact us via the My Support Portal.

If you are having trouble accessing the portal, contact your local OpenText Customer Support office.