

# OpenText Public Cloud SaaS Success Playbook

A complete guide to your OpenText Public Cloud  
SaaS journey



# Welcome and thank you for choosing OpenText

This guide provides an overview of best practices for accessing, launching, and adopting OpenText Public Cloud applications and supporting services. It also explains several ways to stay engaged with OpenText once you are up and running.

We are confident that following the recommendations in this document will ensure your organization receives maximum value from your investment.

Let's get started!

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# Preparing for success

**Setting yourself up for success starts with ensuring access to all the systems and resources needed to configure, onboard, and launch your new application.**

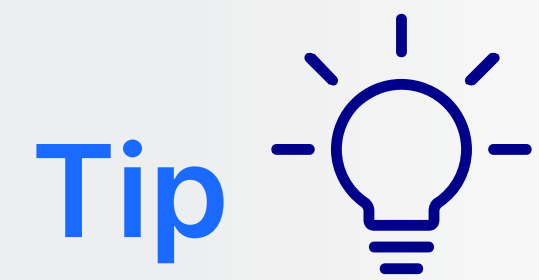
# Access and monitoring

## Application and Admin Center access

Access to all OpenText™ Public Cloud SaaS applications is provided through a welcome email. This initial email will walk you through the registration process, while subsequent emails will provide access to the application(s) and to the OpenText Admin Center. If you are unable to access both the application(s) and the OpenText Admin Center, [please contact support immediately](#).

## Real-time service availability

At OpenText, we believe success is built on trust, and trust starts with transparency. Please visit [status.opentext.com](https://status.opentext.com) and register for real-time, transparent updates covering OpenText Public Cloud SaaS applications service availability and performance.



### Add additional administrators

Are there other members of your organization who need to participate in the application implementation? Make sure to add additional team members via Admin Center.





## Register for MySupport

OpenText MySupport will play a critical part in your OpenText Public Cloud SaaS journey by serving as a hub for all interactions with OpenText. Whether you have a billing question, a technical issue, or just want to access product documentation through our Knowledge Center, MySupport is the place to go.

Ensure you are registered by visiting the main [MySupport page](#) and registering a new account.



You probably aren't the only person at your company who needs access. Once registered for MySupport, add additional contacts from your company who can also access MySupport.



# OpenText Support

OpenText Support is here to support your digital journey 24×7×365, serving as your primary contact for all questions.

# Navigating MySupport

MySupport is separated into two main areas, Knowledge Base and the Support Case system.

The Knowledge Base is where you will find all product documentation, including comprehensive product guides, release notes, and help articles. Start with any search term and then use the filters on the left side to narrow the results to exactly what you're looking for.

The Support Case area is your primary mechanism for contacting OpenText. Whether you have a question about a specific feature, a technical issue, or an enhancement request, logging a support case will put you in direct contact with an OpenText representative.



Ensure that all OpenText Public Cloud SaaS applications you are subscribed to are listed under the My Products & Services area.

# Logging support cases

To log a support case in MySupport, click “Get Support” in the top menu. From there, select the type of support case, which in most cases will be “technical support” or “general support inquiry.”



Subscribe to MySupport alerts for critical product advisories, technical updates, or security alerts.

# Support case best practices

- **Only MySupport contacts listed as Admins or Non-Admin can submit cases**  
Ensure anyone who needs to submit cases is added as a MySupport contact with the appropriate permissions.
- **Only one issue or inquiry should be submitted per case**  
For each new or additional issue or question, please submit a new case.
- **Cases are prioritized as Low, Medium, Serious, or Critical**  
Target response times vary accordingly. Details on target response times can be found [here](#).
- **Case status indicates the next action to be taken on a specific case**  
Check the status of a current case or review all active cases in the [My Cases](#) area.

For help logging cases, review the [MySupport - Help FAQs](#).



To escalate an existing case:

- Call into your local support center.
- Chat with a representative via the chat function in the MySupport portal.
- Add a comment to the case requesting escalation.





# Onboarding and launch

# Authentication

Deciding on an authentication method is one of the most critical steps in onboarding any application, as it will guide many of your onboarding activities. OpenText always recommends setting up single sign-on (SSO) using your own identity provider. Detailed SSO setup instructions can be found in the [Admin Center Guide](#).

If you will be using native email and password authentication, no further actions are required for authentication configuration.



Things to consider when setting up SSO:

- On-demand auto provisioning
- Directory sync
- Password requirements (managed through your IdP)

# Preparing users for success

Preparing users for success starts with ensuring they have all the resources required to understand how to use the new application. OpenText provides diverse types of enablement material to satisfy all types of learners:



In-app help modules



Comprehensive user guides



How-to videos



Click tours



Supplement this material with your own in-house custom-built material to best fit your company and your employees' needs.



# Onboarding and launch tips

## Set goals and track benchmarks

Before driving adoption of any new solutions, it is necessary to establish key metrics for your existing system or solution. Measuring the before-state will help you assess if you are meeting your goals.

### Applicable metrics vary, but might include:



Performance and availability



User adoption



Client engagement



Handling times



Functional gaps



Information accuracy

## Launch announcement

Communicating change is key to a successful launch. Let your users know why you chose this system and how it will benefit them. Make sure to include important details like when and how they will access the new application and where they can access learning and help resources.

## User training

Taking into account your organization's learning culture, develop a plan to ensure different user groups receive the training they need. Explore OpenText's [group classes](#), [private classes](#), and [self-paced online training](#).

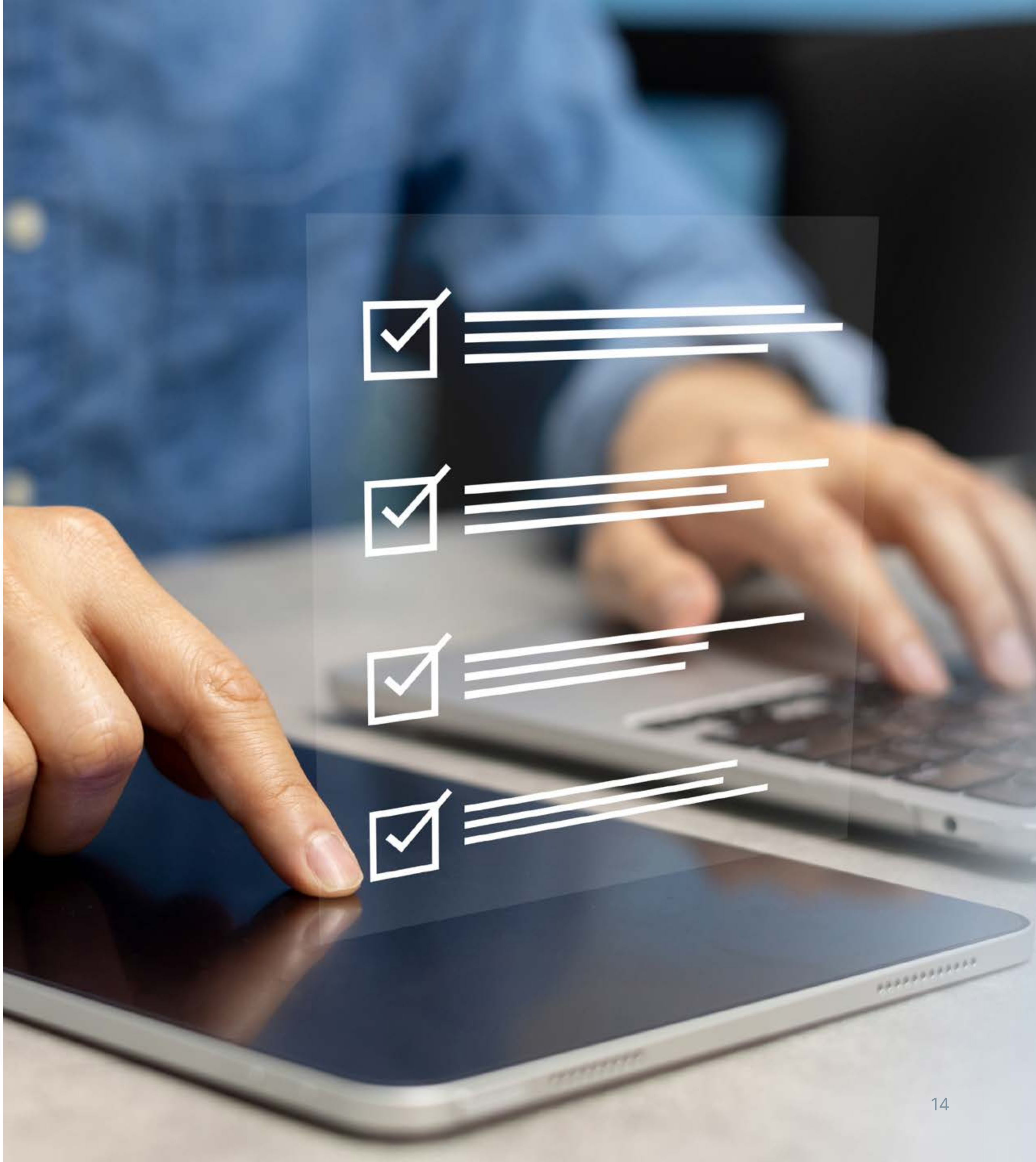
## Establish a feedback loop

Ensure that all communication is two-way and that there is a feedback loop built into everything you do. Determine how you will provide updates to decision makers, as well as how you will gather their feedback and questions.

# Onboarding and launch checklist

Follow this simple checklist to ensure your launch is successful, and you are able to recognize the full benefit of your new OpenText Public Cloud SaaS solution:

|                                                                                     |                                            |                          |
|-------------------------------------------------------------------------------------|--------------------------------------------|--------------------------|
|    | Establish goals                            | <input type="checkbox"/> |
|    | Configure authentication                   | <input type="checkbox"/> |
|  | Prepare learning material for distribution | <input type="checkbox"/> |
|  | Craft and send a launch announcement       | <input type="checkbox"/> |
|  | Follow up with users on their experience   | <input type="checkbox"/> |



A photograph of four business professionals in an office setting. A man with glasses and a beard, wearing a dark blue suit, is seated and smiling while gesturing with his hands. To his left, a woman with short dark hair and glasses, wearing a grey blazer over a red turtleneck, is leaning in and smiling. To his right, a woman with long red hair, wearing a grey sweater, is also smiling. Behind her, a woman with dark curly hair, wearing a green button-down shirt, is leaning over and looking at the man. The background is a bright, modern office with large windows.

# Adoption, engagement, and growth

A successful launch is only the start of your journey with OpenText. We're here to ensure you get the most out of your Public Cloud SaaS investment through ongoing opportunities for learning and engagement.

# Learning Services

Discover training options to help users of all skill levels effectively adopt and use OpenText products. OpenText offers a range of courses, programs, and certificates from beginner to expert.

Visit the [Learning Services homepage](#) for more information.

## Keep up to date

OpenText is committed to constantly improving our applications. We release new versions of all Public Cloud SaaS applications each quarter, which come with a host of new features, integrations, and bug fixes. You can always stay up to date on what's new via:



### Product roadmaps

In-depth product roadmaps are available in [MySupport](#) so you can always be aware of what's coming.



### Release announcements

Register on the OpenText status page to receive email announcements around releases.



### Blogs

Subscribe to your application's [Executive blog](#) to read about ideas and announcements from OpenText experts.



### In-app announcements

Keep an eye out for in-app announcements and learning opportunities.



### Forums

Visit our [product forums](#) to interact with and learn from experts and fellow customers.

# Stay engaged



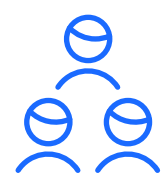
## Surveys

From time to time, you may receive a survey from OpenText. This is your opportunity to tell us your opinion and how we can improve your experience.



## Webinars

Look out for invitations to hear from OpenText experts about your application or about general Public Cloud SaaS best practices. Explore our [webinar calendar](#) to see what's upcoming or access recordings of previous webinars.



## Advisory councils and user groups

Join fellow customers and OpenText experts as they share the latest trends and best practices while showcasing innovative technology and use cases in an intimate setting.



## Industry events

Heading to a technology industry event? OpenText will be there! Seek us out at the next event you attend.



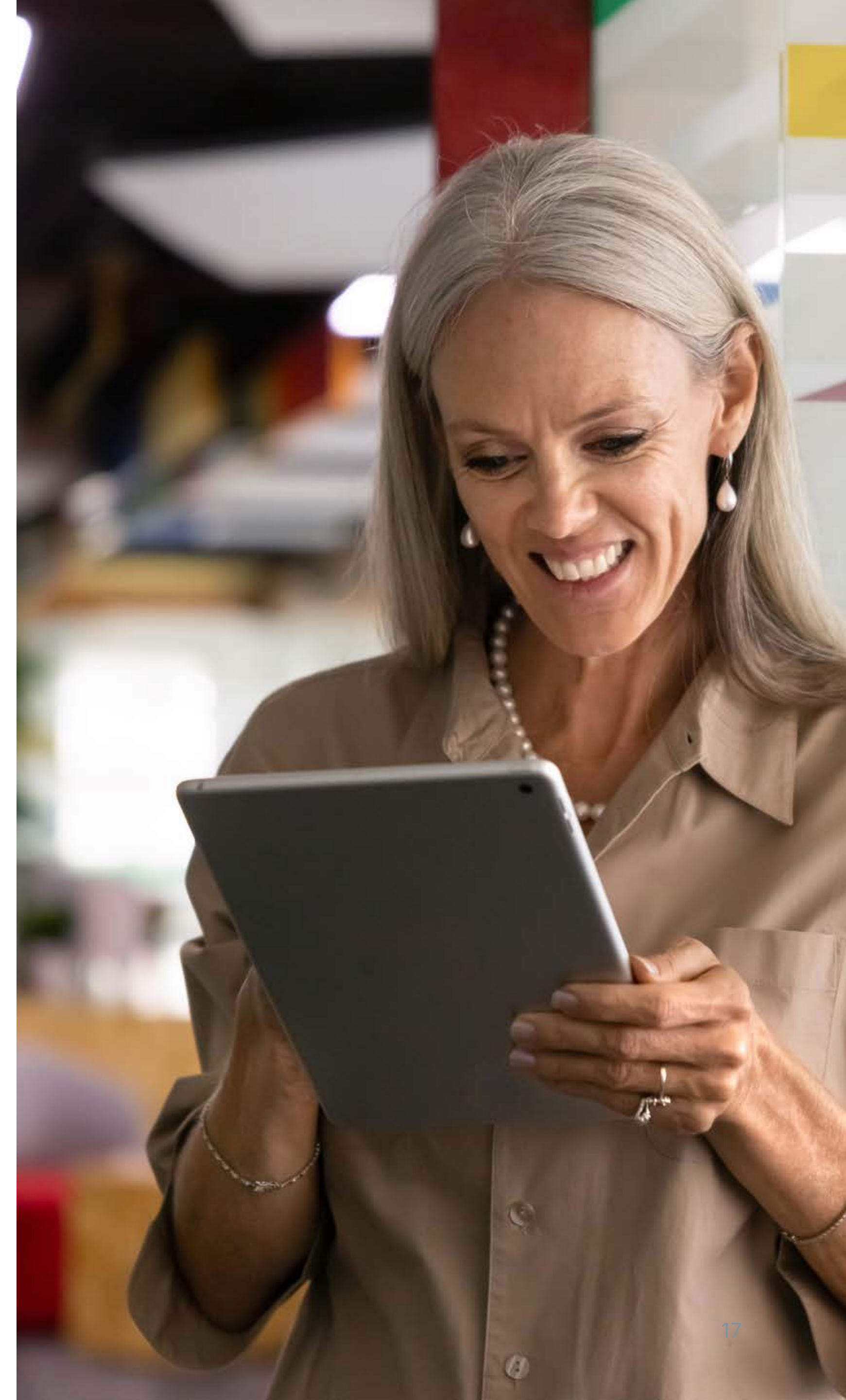
## OpenText World

OpenText World is OpenText's flagship event. Come engage with OpenText experts, partners, and fellow customers. Get special presentations from our Executive Team and panel guests.



## Become an advocate

Join [OpenText Navigator](#) to raise your profile, earn certifications, connect with leaders and enjoy exclusive experiences.



# Customer success

With all the self-service resources available from OpenText, like MySupport, Learning Services, and our Onboarding checklist, we feel confident that you will be set up for success. However, if you need additional guidance, OpenText Customer Success is here to help.

OpenText Customer Success Services offers a holistic, strategic program that delivers faster time to value while increasing engagement and adoption for Public Cloud SaaS customers. By building strategic partnerships across OpenText and guiding customers through a trusted planning methodology, Customer Success managers help ensure a successful journey.

[Learn more](#) about how OpenText Customer Success Services can transform your Public Cloud SaaS journey.



**Deeper engagement** with experts to achieve successful adoption long term



**Proactive success planning** to achieve business outcomes



**Faster time to value** through OpenText's guided Success Program



Program governance and reporting to track progress and **ensure goals are met**



## About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://opentext.com).

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