

# eSupport Portal - Usage Guide

February 2025



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### What's the eSupport Portal?

### What's the eSupport Portal?

The "eSupport Portal" is a highly user-friendly support website, customized to match customers' products and their interactions with them. It provides 24/7 access to various self-support tools, including the "Knowledge Base" and license tools.

This guide explains how to access the eSupport Portal, obtain the necessary PTC Online Account, and use the main support tools available.



### How to Access the eSupport Portal

The eSupport Portal can be easily accessed from the PTC website.

- 1. Access the website: http://www.ptc.com/
- 2. Expand the "Education & Support" section at the top of the page, click on "eSupport," and log in to the eSupport Portal. <a href="http://www.ptc.com/support/">http://www.ptc.com/support/</a>
- 3. If you do not have a login account, please create a PTC Online Account.



### How to Create a PTC Online Account 1/3

#### How to Create a PTC Online Account

To access the PTC eSupport Portal, a PTC Online Account needs to be registered.

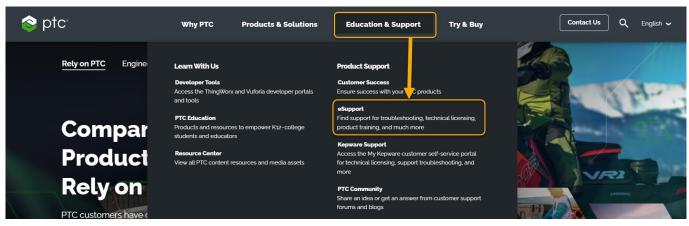
#### If you have already registered, no further action is required.

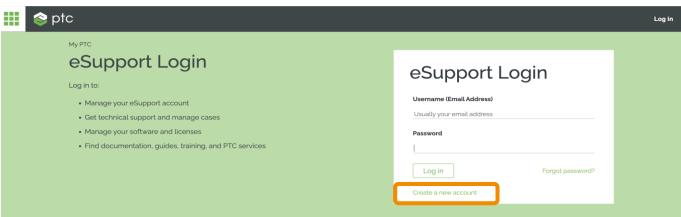
Before registering, please prepare the following information:

- Your PTC Customer Number
- Either your Sales Order Number or Service Contract Number

The PTC Customer Number and Sales Order Number can be found on your delivery note.

- 1. Access the website: <a href="http://www.ptc.com/">http://www.ptc.com/</a>.
  - 1. Expand the "Education & Support" section at the top of the page.
  - 2. Click on "eSupport".
  - 3. On the displayed page, click "Create a New Account".

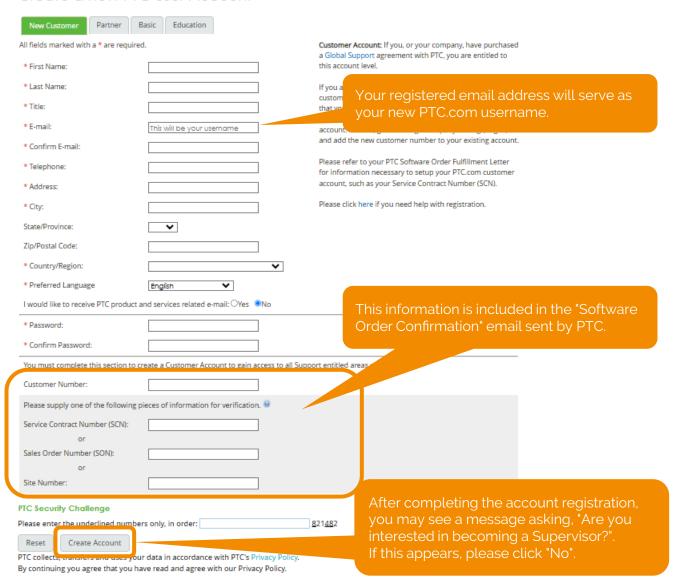




### How to Create a PTC Online Account 2/3

- 2. Go to the "New Customer" tab and enter the required information into the form. After completing the form, click "Create Account".
  - Fields marked with "\*" are mandatory
  - The password must be at least 8 characters long and consist of alphanumeric character.
  - Enter either your Customer Number, Service Contract Number, Sales Order Number, or Site Number in the designated red-framed field.

#### Create a new PTC User Account

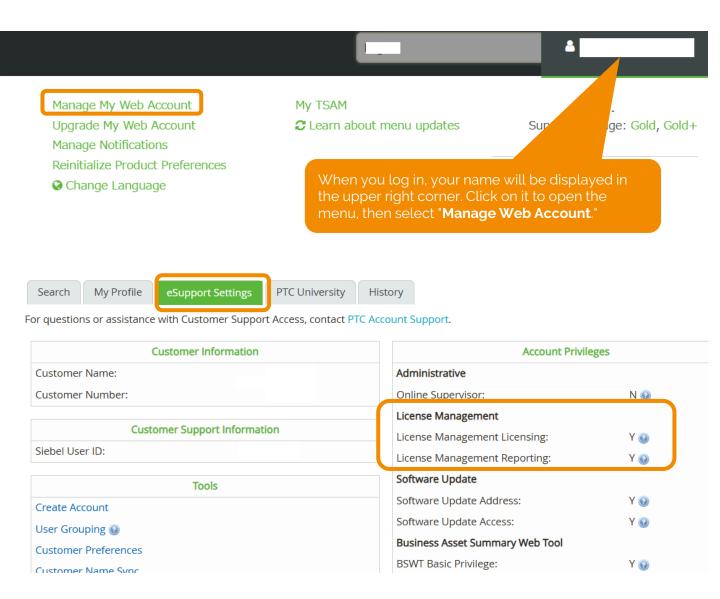


3. You will receive an email from the PTC Customer Account Management Team (do\_not\_reply@ptc.com) with the subject "Your PTC.com Account Has Been Created". Please click on the link provided in the email to proceed with the **upgrade process**. If you do not receive the email, please check your spam/junk mail folder just in case.

If the email verification is not completed with the upgrade process, you will not be able to download software or open support cases. Please make sure to complete the verification process.

### How to Create a PTC Online Account 3/3

4. After completing the email verification in step "3", you may need to add license management permissions to access the License Management menu. Go to the "My Account" page in step "1", select "Manage Existing Account," and click the "eSupport Settings" tab. If the "License Management" section under "Account Permissions" is displayed as "N," please contact your company's supervisor (PTC online account administrator).



### Knowledge Base Search 1/3

### Knowledge Base Search

It is a highly convenient tool that allows you to easily and smoothly search various types of technical documents using natural language.

Multiple language contents are available (Japanese, Simplified Chinese, Korean, German, French, Spanish, Italian)

#### Improvement of Search Query Suggestions

As you type, alternative search term suggestions and automatically suggested search terms are now displayed.

In the search box, you can search for content such as knowledge base articles, product documentation, help center resources, and community posts.



#### **(Search Tips)**

#### Searching by Document ID

Knowledge Articles and SPR can be found by searching their ID (File but CS123455, SPR #).

#### More search terms can provide more relevant results

- Short queries (less than 5 terms) will only match content that contains all the terms.
- Longer queries (more than 5 terms) will match content that contains most of the terms.
- More terms can produce more relevant results (e.g. delete vault files automatically will produce more relevant results than just delete files.)
- If you have an error message related to your problem, copy and pasting the exact error into Search should product the best results.

#### Searching in double quotes may not produce better results

If a query is wrapped in double quotes, it forces the Search to only return matches that contain those exact terms in that exact order.

e.g. "export LDIF file" will NOT match content with How to Export Windchill DS to an LDIF File but will match How to export LDIF file.

Do not wrap error messages in double quotes, especially if the error message might contain variable terms (like filenames, table names, non-a etc.)

#### Removing special characters may produce better results.

- In general, most non a-z ,0-9 characters are ignored (e.g. special-section will match special section and vice versa)
- However, the presence of a special character between two terms is the equivalent of wrapping in double quotes.
  - e.g. special-section will match add a special section but not the section is special

### Knowledge Base Search 2/3

#### Wildcards and other special query parameters

- Wildcards are not supported.
- However, the following characters will change search behavior:
  - Plus (+).
    - If a keyword is preceded by a '+' then the keyword is searched for 'as-is'. For example, +fail will only match content with the word fail and not fails, failure, failed etc.
    - Note: this does not act as a 'content must have' modifier when the search is performing partial matches.
  - Minus (-).
    - If a keyword is preceded by a "-" then the search results will NOT include content that has this keyword in it.

#### Case Is ignored

PTC Search is not case sensitive. A search for *Creo parametric direct and layout* will return the same results as Creo Parametric Direct and Layout.

#### Words are stemmed

Terms are automatically stemmed, so failure will automatically match fail, fails, failing, failed etc. and vice versa.

#### Languages

- Whilst customer are free to search in any language, not all content is available in all languages:
- Support Articles: Available in English, Japanese and Chinese.
- Community Posts: Predominantly English.
- Product Documentation and Help Centers: Available in multiple languages.
- Other content may vary

#### Advanced Queries.

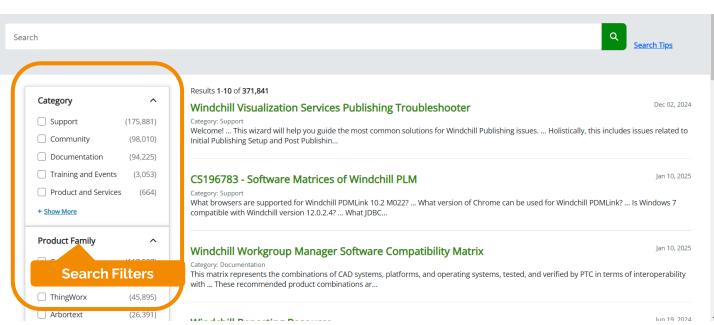
The use of advanced Query Language operators such as AND, OR, NEAR, WORDS etc. or field searches are not currently supported.

## Knowledge Base Search 3/3

#### **Refining Your Search**

#### Knowledge Base Search

In the advanced search screen of the knowledge base, you can refine your search criteria by specifying product groups, releases, document types, and more in addition to keywords. Select your desired conditions and click "Apply."



Filter	Options	Details
Category	Documentation	User Guide, Release Advisor etc
	Support	Article
	Community	Community Forum / Topic
	Training and Events	Training and Tutorials
	Tools	License Management Tool, Product Calendar etc
	Product and Services	Others
Product Family	Ex. Creo, Windchill, ThingWorx etc	Categorized by PTC Product brand/family
Product	Ex. Creo Parametric, Creo View, Windchill PDMLink, ThingWorx Navigate etc	Group of each PTC Product Software names
Release	Ex. 12.0, 12.0.1 etc	Group of a product release version
Language	English, Japanese, Simplified Chinese, Germany, French,, Spanish, Italian	Available languages

## Open a Support Case (Support Assistant) 1/3

### Open a Case (Support Assistant)

You will need a Service Contract Number (SCN). Please have it ready in advance.

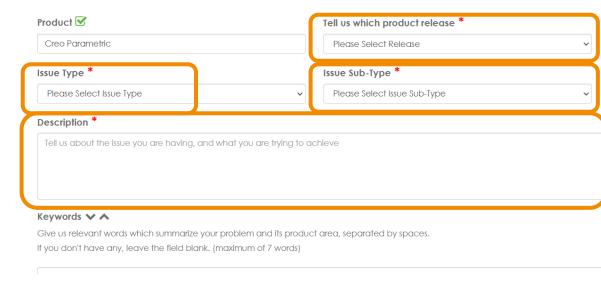
If you encounter any issues, you can contact Technical Support via the web tool "Support Assistant " or phone. Using Support Assistant allows you to reach Technical Support 24/7. Once you open a case through Support Assistant, you will receive a case number in return. (\*Customers using reseller support are not eligible for this service.)

1. Click "Open a Support Case" at the bottom right of the homepage. STATUS My Active Requests DESCRIPTION o REPLY Jan 27, 2025 1 REPLY Nov 17, 2024 1 REPLY Nov 17, 2024 **O** ASSIGNED Feb 4, 2014 VIEW REQUEST HISTORY Enter tracking number to track an existing case

- 2. After entering the product name, select the product from the displayed list...
- 3. Enter the product release, issue type and subtype, inquiry details, and error messages if applicable, then click the "Next" button.

### Support Assistant



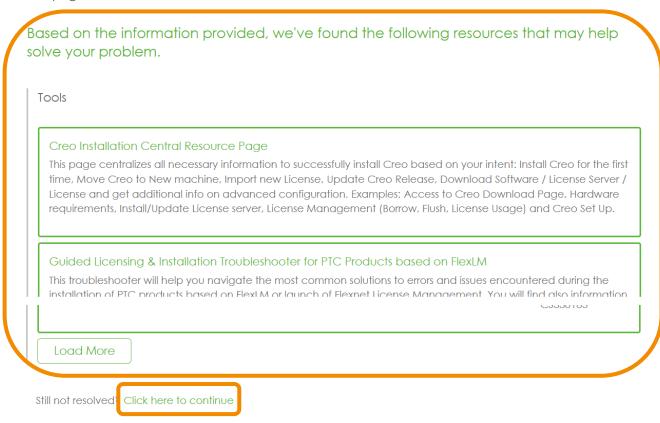


OPEN A SUPPORT CASE
ACCESS THE PTC COMMUNITY

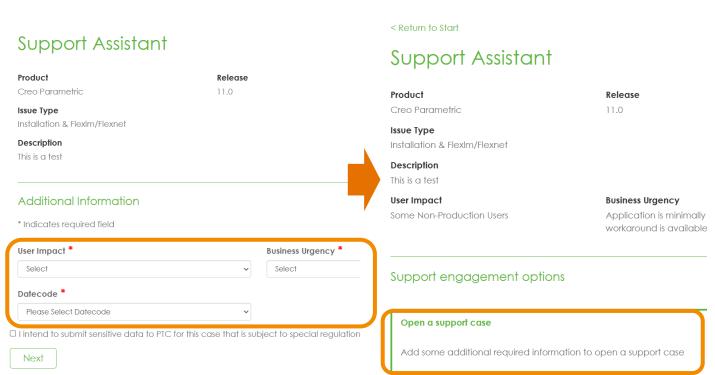
## Open a Support Case (Support Assistant) 2/3

4. Based on the information you entered, as well as frequently used articles, possible solutions related to your inquiry will be displayed.

If you do not find a solution to your issue, click "Click here to receive support" at the bottom of the page.



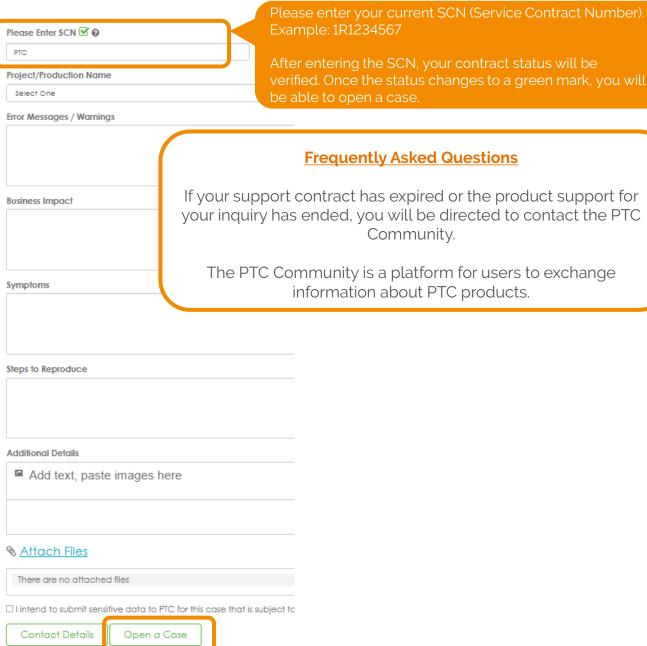
Select the impact on the user, business urgency, and manufacturing code, then click "Next."From the support method options, select "Open a Support Case."



## Open a Support Case (Support Assistant) 3/3

6. Please enter the detailed information about your inquiry.

Final information required to submit yo



7. When a case is successfully opened, you will see your case number. Please wait for further contact from a Technical Support Engineer. This case number will be used for tracking your inquiry.

Additionally, a confirmation email will be sent, and you will be able to review detailed case history on the web.