

Bentley Support Portal

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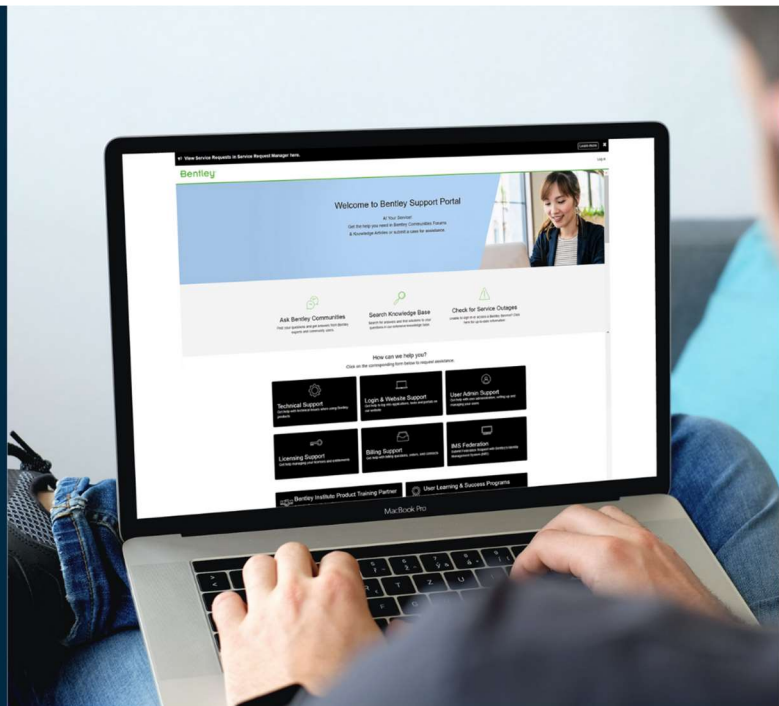
THE BENTLEY SUPPORT PORTAL

With the launch of Bentley's Support Portal, you can quickly access our Bentley Communities' forums and knowledge articles to self-serve and troubleshoot software and other service issues as they arise. There you can also find information on any Bentley Solution outages and contact our support team directly by filling in a web form.

With Bentley's Support Portal, you can create or manage **cases** (formerly known as Service Requests) for topics including Technical Product Support, Billing Support, Licensing Support, Federated Account Requests, access to User Learning & Success Programs and the Bentley Institute Training Partner program.

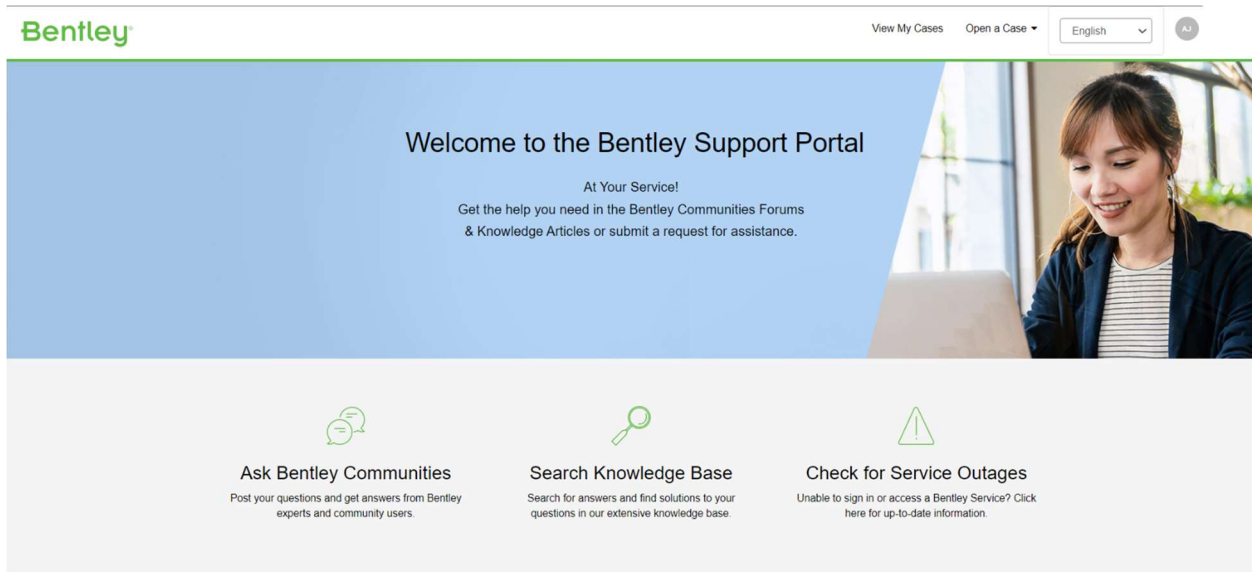
The Bentley Helpdesk Site makes it easy for you to:

- create and manage your own cases
- quickly access Communities for forums and knowledge articles
- find information on Bentley Solution outages
- contact the Support Team via web form











ACCESSING THE PORTAL

To access Bentley Support Portal, log in to <https://bentleysystems.service-now.com/csp>



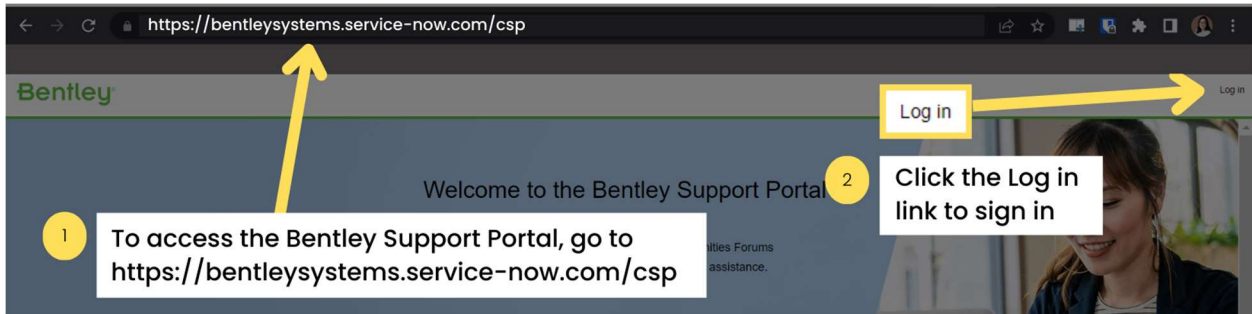
How can we help you?

Click on the corresponding form below to request assistance.

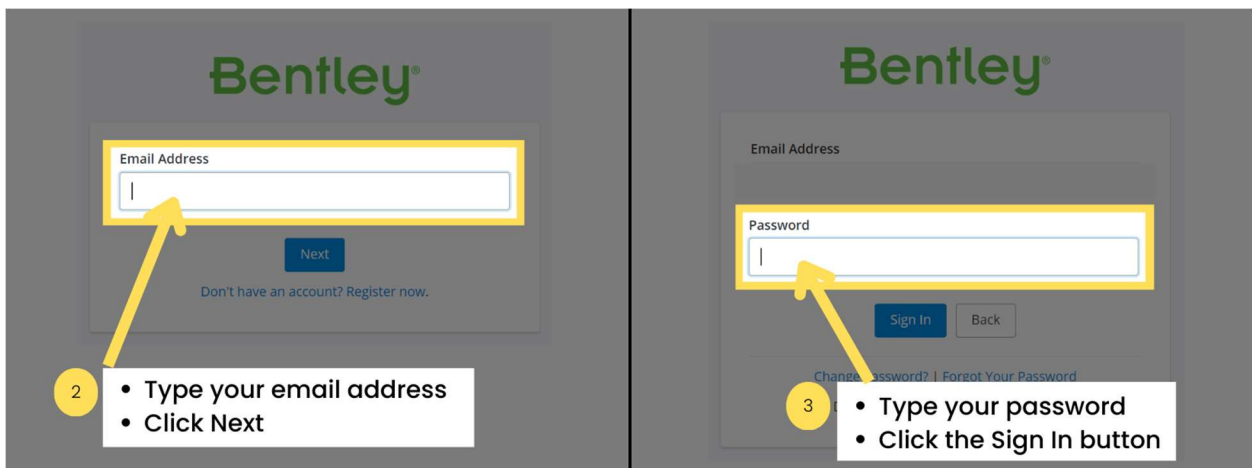
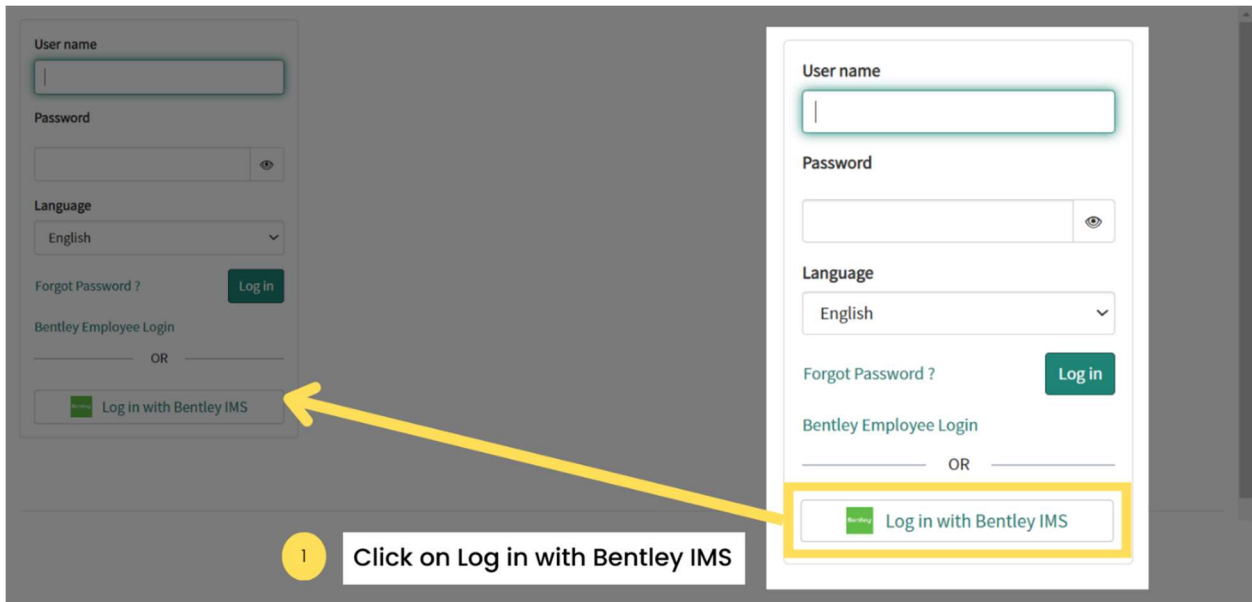
 Technical Support Get help with technical issues when using Bentley products	 Login & Website Support Get help to log into applications, tools and portals on our website	 User Admin Support Get help with user administration, setting up and managing your users
 Licensing Support Get help managing your licenses and entitlements	 Billing Support Get help with billing questions, orders, and contracts	 IMS Federation Submit Federation Request with Bentley's Identity Management System (IMS)
 Bentley Institute Product Training Partner Submit a Training Partner Program request	 User Learning & Success Programs Submit LEARN server, live trainings or academic request	

LOGGING IN TO THE PORTAL

Click the **Log in** link on the top right corner to sign into your account.



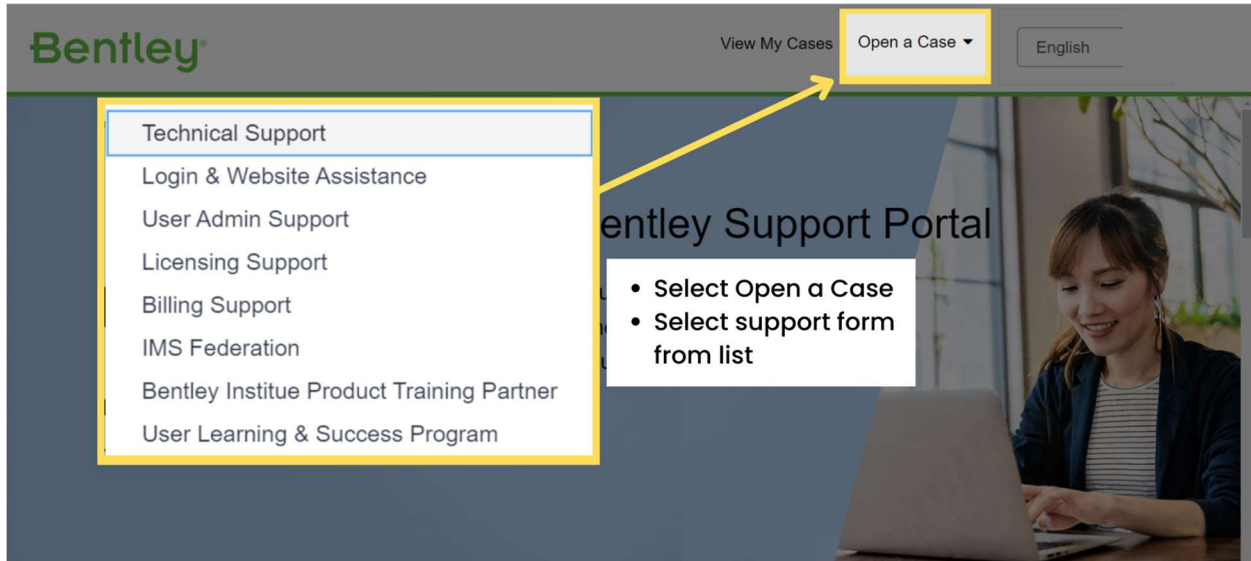
You will automatically be redirected to the log in page. Select **Log in with Bentley IMS** to log in with your Bentley registered credentials.



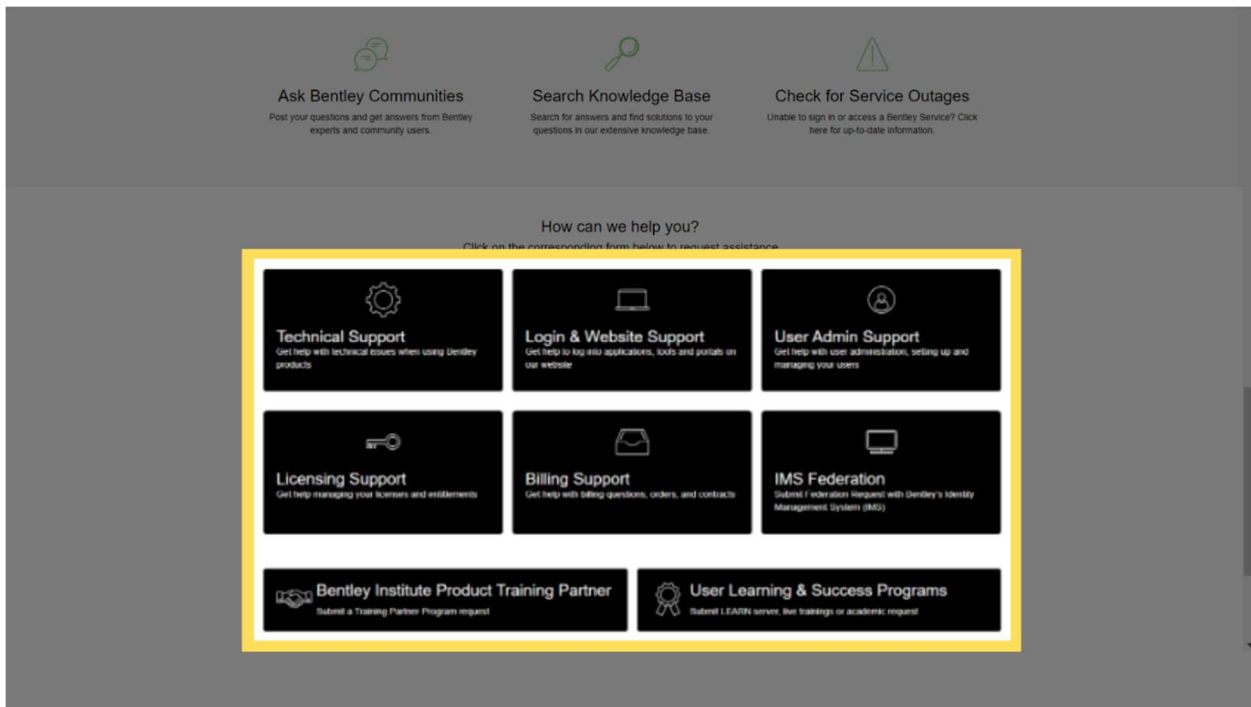
OPENING A CASE

1.1 CREATING A CASE

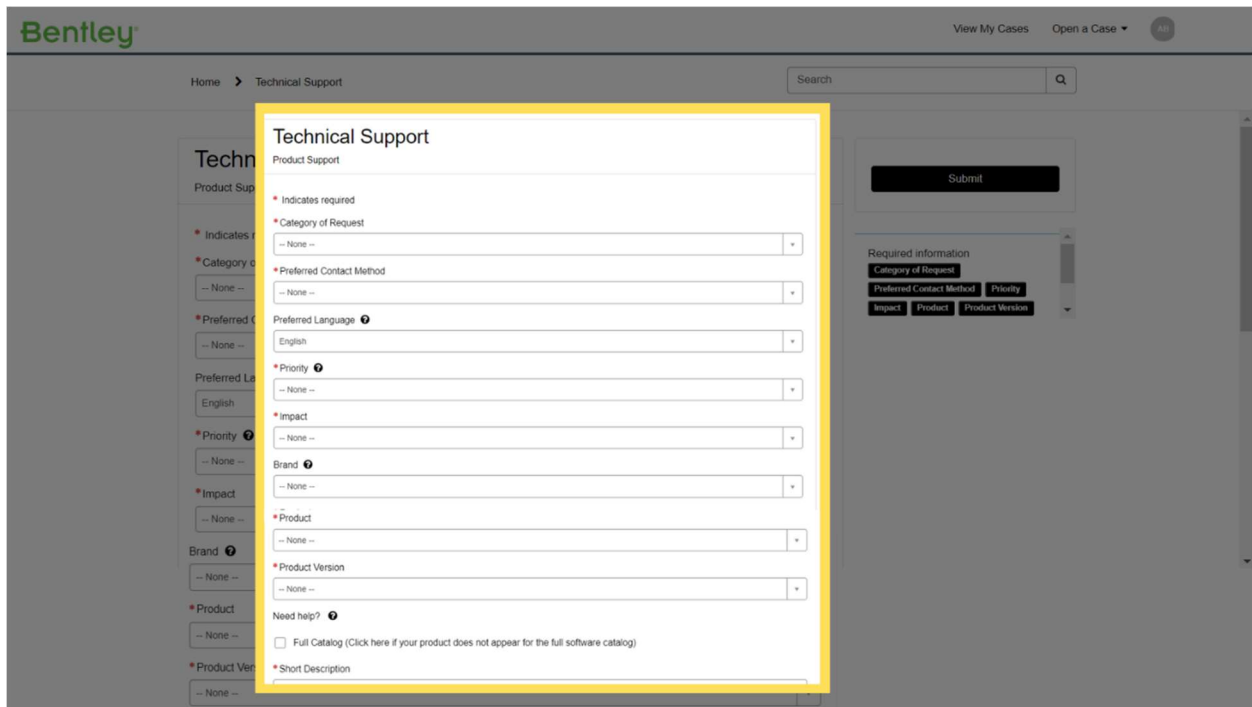
Option 1: To create a case, you can click on **Open a Case**.



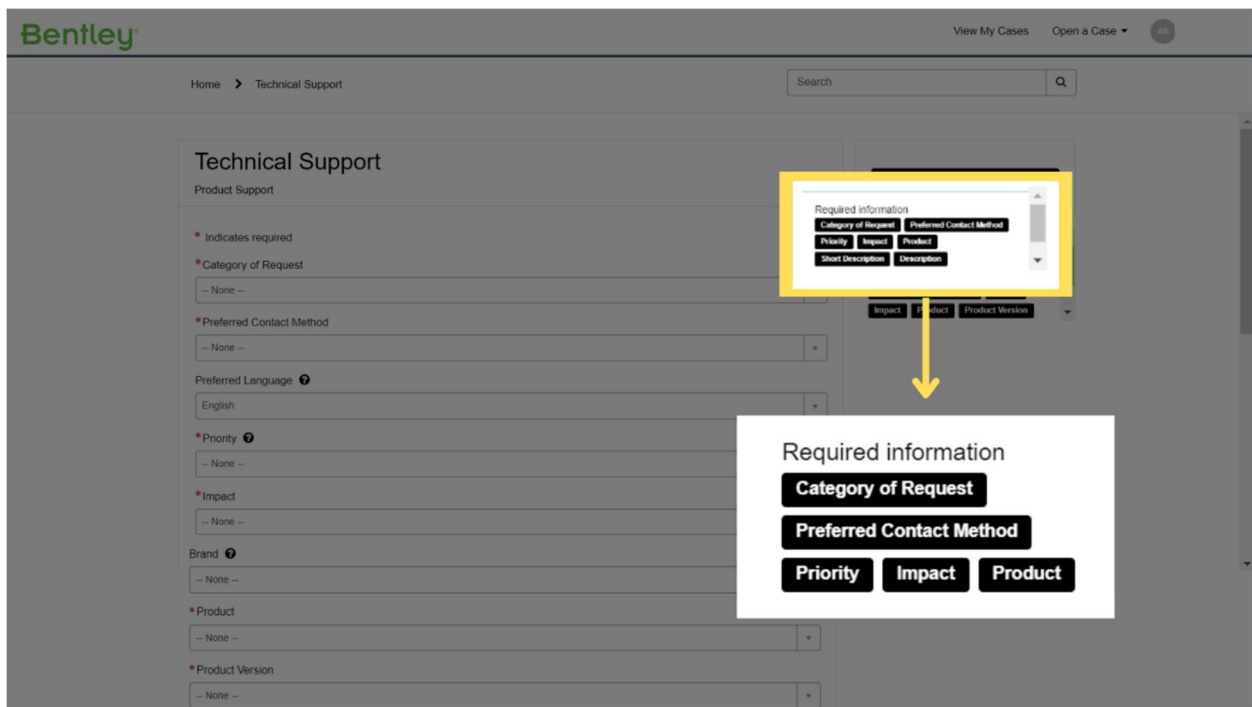
Option 2: Alternately, you can also click on one of the choices on the bottom half of the home page. For this example, select the **Product Support** option on the home page.



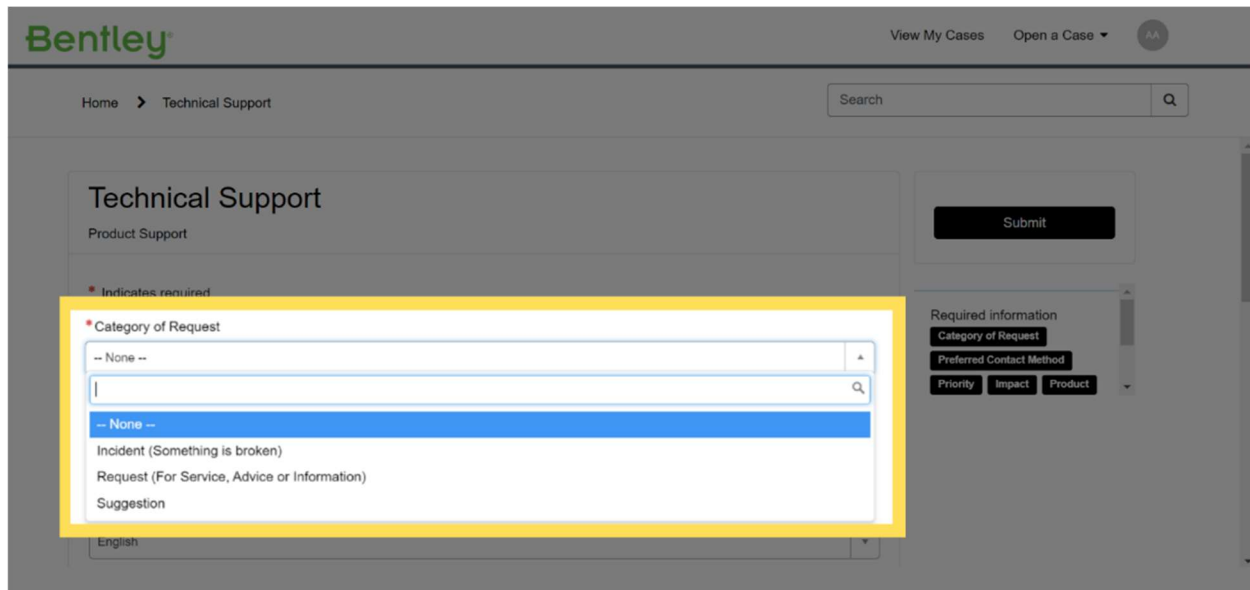
The **Product Support** form opens (a populated case is shown).



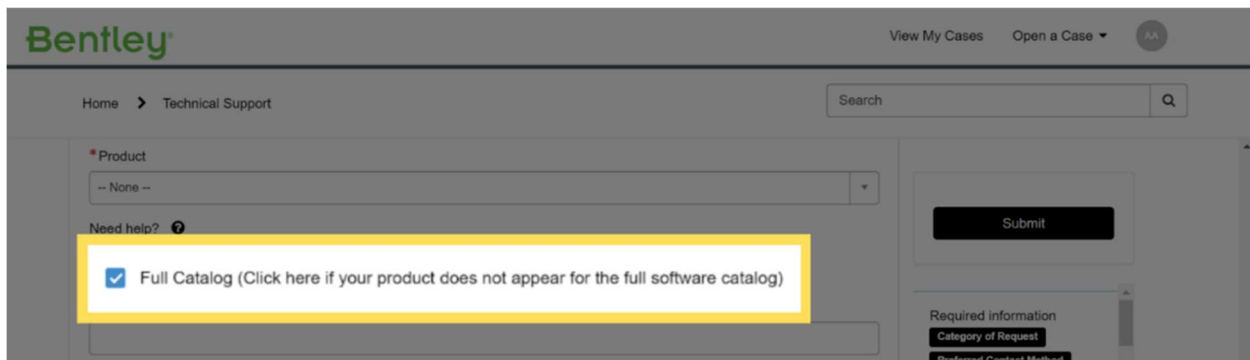
The **Required Information** panel (shown under the **Submit** button) only appears when required fields remain on the form. It displays the list of fields required to submit the case.



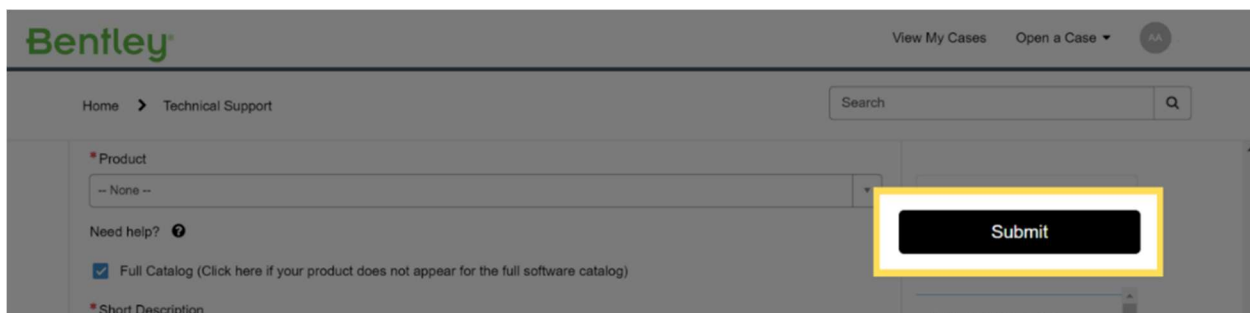
Populate the required fields. Most of the fields on the form can be answered using drop-down menus related to each of the fields.



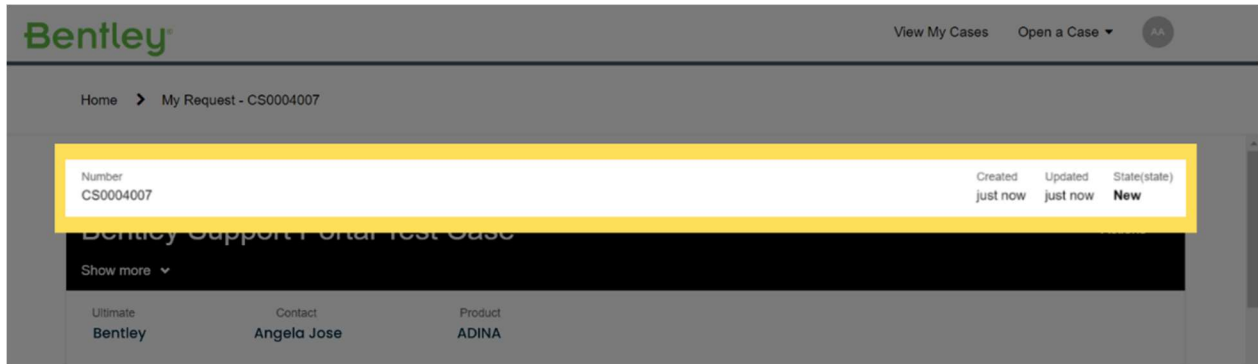
To view the entire software catalogue, click the checkbox to the left of the **Full Catalog**. This displays the software the user can select from.



When all required fields have been populated, the user can click **Submit**. The case is now saved and submitted.

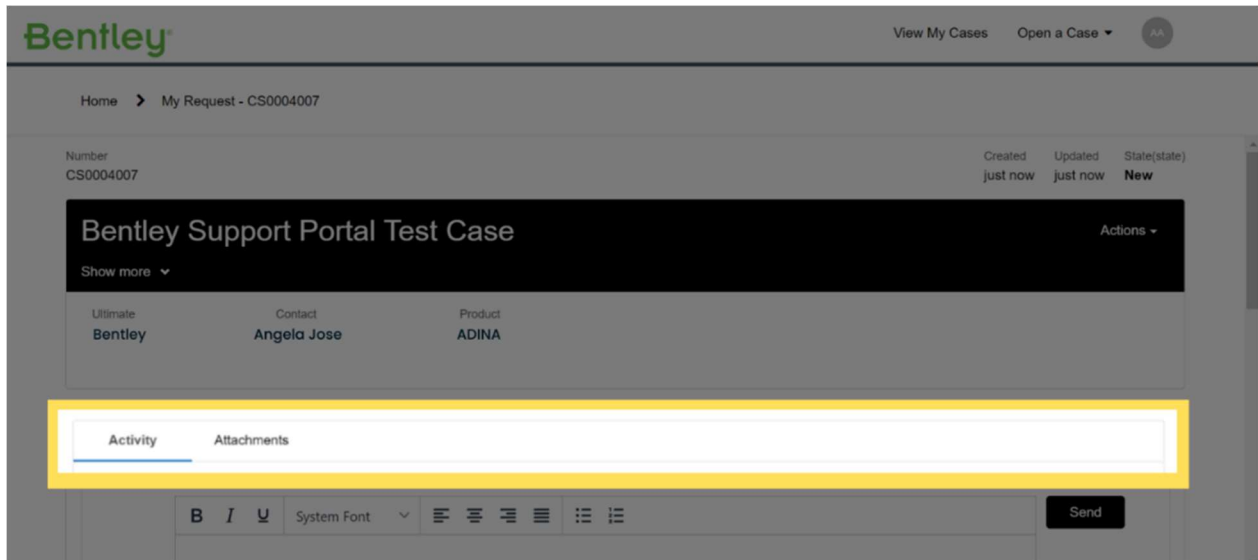


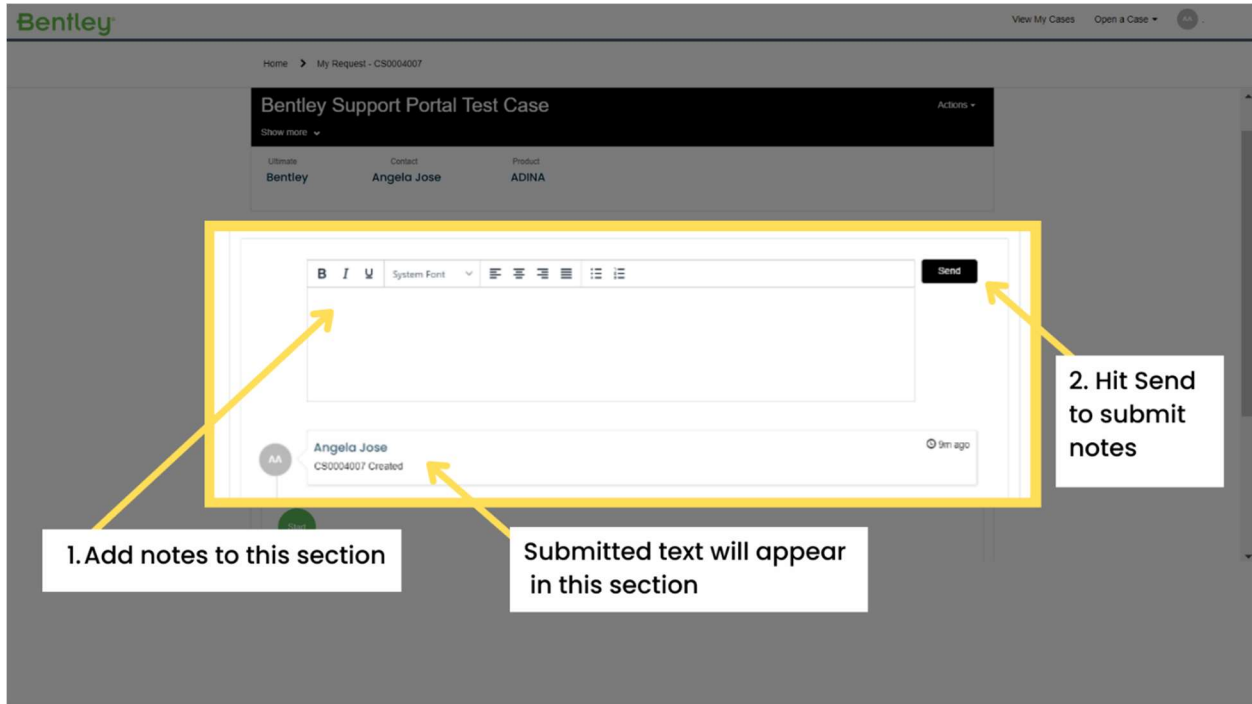
You will be taken to **My Request – CS000xxxx**. The case number appears at the top of the page and the state of the item appears to the far right.



Note: This page is where you can view the progress of their case. The state of the record is "New" (*shown on the far right*) meaning the case has just been opened and will change to Work in Progress when a colleague has been assigned to the case.

There are two tabs below the case name: **Activity** (shown by default) and **Attachments** (*where attached files can be found – not shown*).





Note: You will be able to view your message exchanges between yourself and Bentley Support in the **Activity** queue.

If you wish to close your own case, you can click the **Close Case** option under the **Actions** drop-down.



1.2 SELECTING THE CORRECT FORM

Request	Description	Support Team
Product Support	Get help with technical issues when using Bentley products	Global Technical Support
Billing Support	Get help with billing questions, orders and contracts	FINOps
License Support	Get help managing your licenses and entitlements	Global Technical Support
User Administration Support	Get help with user administration, setting up and managing your users	Global Technical Support
Login and Web Services	Get help to log into applications, tools and portals on our website	Global Technical Support
IMS and Federation Requests	Submit Federation Request with Bentley's Identity Management System (IMS)	IMS
User Learning and Success Programs	Submit LEARN server, live trainings or academic request	LEARN team
Bentley Institute Product Training Partner	Submit a Training Partner Program request	Training team

1.3 FILLING OUT THE FORM – CASE DETAILS

1.3.1 Category of Request

Refers to the reason that you are opening the case, please indicate if the query you are submitting relates to:

- **Incident** – report something that is broken or not working as designed; involves outage, malfunction, or incorrect settings of a product
- **Request** – request for service, advise or information
- **Suggestion** – provide feedback or suggestion

1.3.2 Contact

To open a case, add your details here. Type in your name or email address.

1.3.3 Preferred Contact Method*

The preferred method by which you will be contacted by Bentley Support

- Email
- Phone
- Mobile phone

1.3.4 Preferred Language

Refers to the language you want to use for case-related communication.

To change the overall language settings for the portal and forms, please go to: [Update Profile](#)

1.3.5 Select the best option that matches your situation*

Refers to the urgency of the issue you encountered. Select the value that represents your situation from the measures below:

Critical: Complete loss of service or production down situations where no workaround exists. Incidents which have a critical impact on the business's ability to maintain operations and demand an immediate response. The production down incident affects multiple locations or high number of users in a location.

High: Severe loss of functionality or performance. Major feature/product failure, where short-term workaround may be available; operation can continue in a restricted fashion. The application is usable but severely limited. Risk of impacting the deadline. A high number of users unable to perform their functions.

Medium: Incidents that cause non-critical product features to malfunction consistently. Major feature/product failure where an acceptable workaround is available. Problems with a business function in the software, which causes severe inconvenience to users.

Low: Incidents that do not compromise production or for which a suitable workaround has been identified. Operational questions, informational requests. Limited impact and urgency; work progress not directly impacted.

1.3.6 Impact*

Refers to the number of affected user/s

- One User – single user impacted
- Multiple Users at One Location – users working in one location
- Multiple Locations – regional or sitewide users impacted

1.3.7 Brand

Refers to the brand name for the product that the requires support or inquiry

By default, you will initially see the brand(s) used by your account within the last 60 days.

If you would like to select a different brand, select the **Full Catalog** box to display the entire list of Brand and Products. Doing this will delete any previous entry on the field.

This field is not mandatory so if you do not know the brand name, you can leave this field empty and select the product.

1.3.8 Product

Refers to the product name that requires support or inquiry

By default, you will initially see the product(s) used by your account within the last 60 days.

To select a product, start typing the product name in the field or select the product from the dropdown menu.

1.3.9 Product Version

Refers to the number which identifies the specific version of your licensed software. Select the Product Version number from the dropdown. If you do not know your version number, this information can normally be found in the Help/About Section in the software.

1.3.10 Product-Based Fields

Refers to the fields that populate based on the product reported

- **Type of Issue** - On the Product Support in-take form, this is a specific field for Managed Services Users when they choose a Managed Services Product linked to their account. This field appears for them to select a reason from Type of Issue field.
- **Product Area** – For some of the products, there are values in this field to clarify the topic that relates to the reason the case was opened. This field will appear mandatory if the selected product has product areas available.

1.3.11 Full Catalog

Based on your account, the brand/product fields will first populate with the complete list of products the account has used in the last 60 days.

If the product does not appear, click the checkbox to the left of the Full Catalog to display the full catalog of Bentley software you can select from.

1.3.12 Short Description*

Refers to the field where you can add a brief but informative description of the issue. It is important to provide a summary here of the issue/request.

1.3.13 Description*

Refers to the field where you can add a detailed description of the issue. Please be as specific as possible and include any necessary attachments so Bentley Support has information needed to begin working on the case.

1.3.14 Customer Reference Number

Use this field if you would like to provide a specific reference number to track certain topic or project. Most typically used by Partners who submit a case on behalf of their users.

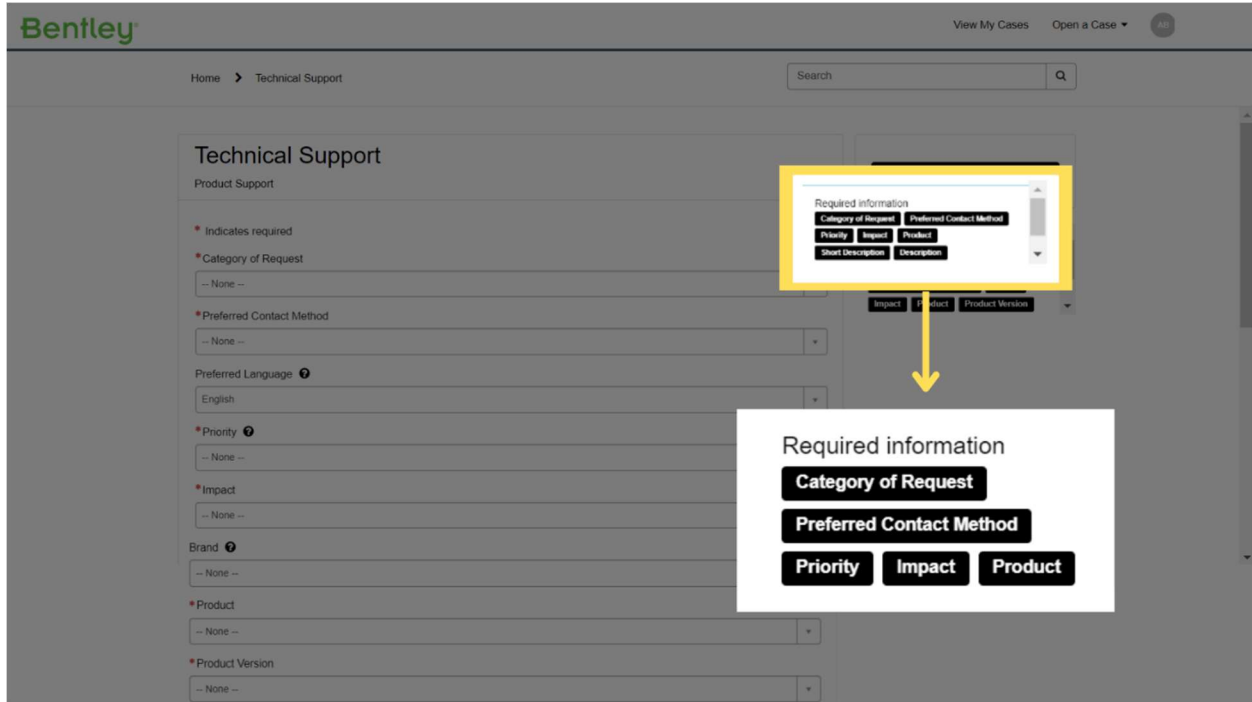
1.3.15 Add Attachments

Refers to the section where you can add supporting documents such as screenshots, source codes and other files to help troubleshoot/resolve the request.

Click on the paperclip icon and select the file that you wish to attach. (Doing a drag and drop motion in this section will not attach the files.)

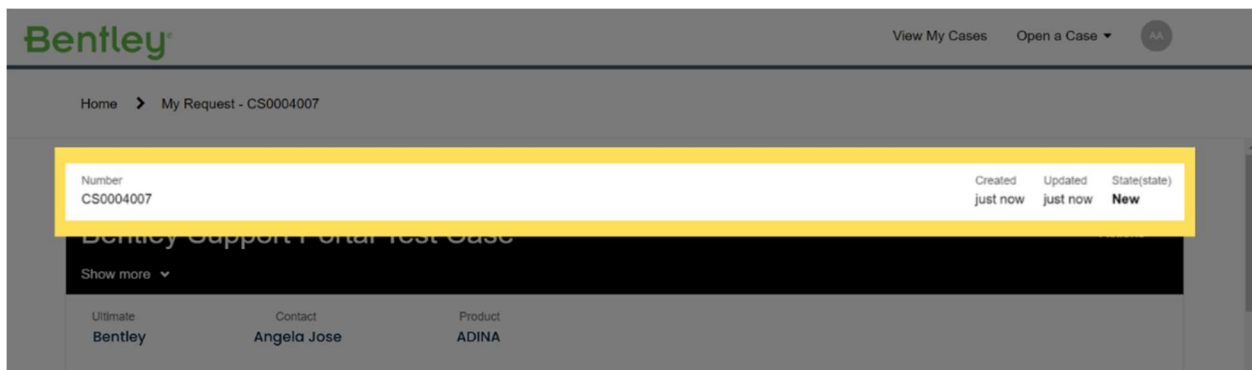
1.4 COMPLETING MANDATORY FIELDS

To successfully submit the form, the mandatory fields must be completed. You may also view the required mandatory fields on the right pane section of the page.



1.5 SUBMITTING THE CASE

Once a case has been submitted, the page will redirect you to a My Request view (also referred to as **View My Cases** section). The case number will appear on the top of the page and state of the items will appear to the far right.









Accounts on Hold:

Note for Users with Accounts on Hold: When you enter the Bentley Support Portal and your account is on-hold for billing/payment issue, the forms for support will appear greyed out. You will see a message to contact the billing team for further assistance.

How can we help you?
Click on the corresponding form below to request assistance.

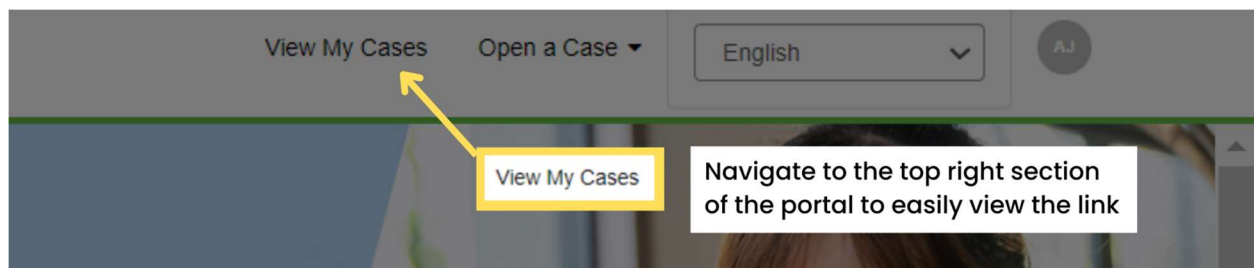
There is a payment related alert on your account. To contact our invoicing and billing team, please [click here](#). If you need help in meantime, you may also visit our [Bentley Communities here](#).

 Technical Support Get help with technical issues when using Bentley products	 Login & Website Support Get help to log into applications, tools and portals on our website	 User Admin Support Get help with user administration; setting up and managing your users
 Licensing Support Get help managing your licenses and entitlements	 Billing Support Get help with billing questions, orders, and contracts	 IMS Federation Submit Federation Request with Bentley's Identity Management System (IMS)

MANAGING CASES

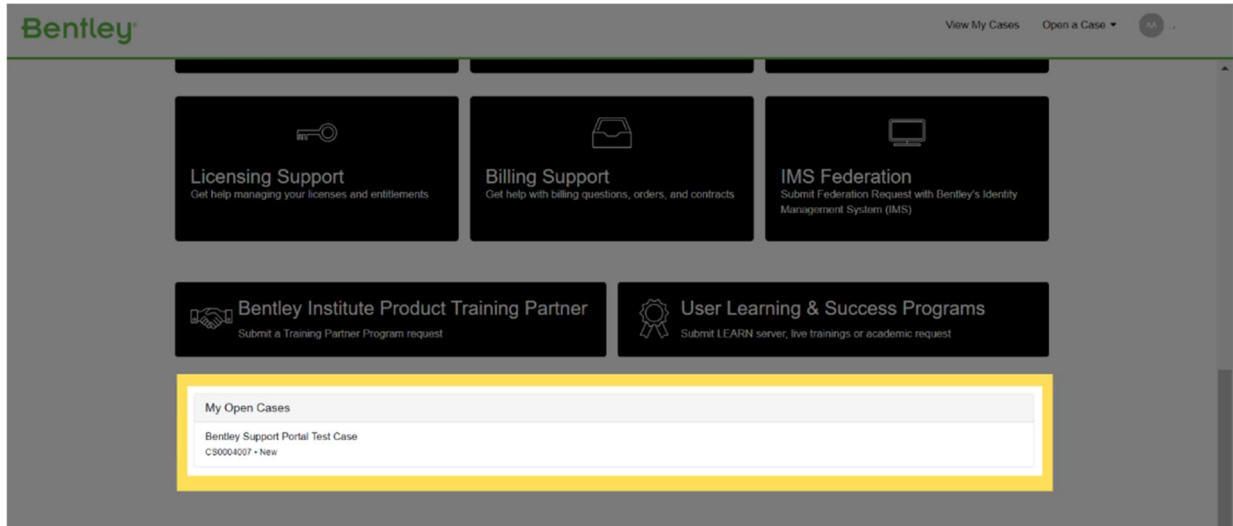
1.6 VIEWING CASES

To view or manage your existing cases, click on **View My Cases** from the top-right menu.



After clicking on View My Cases, the **My Cases** page will open.

Alternately, you may also view your open cases from the Bentley Support Portal homepage by hovering towards the bottom section of the page.

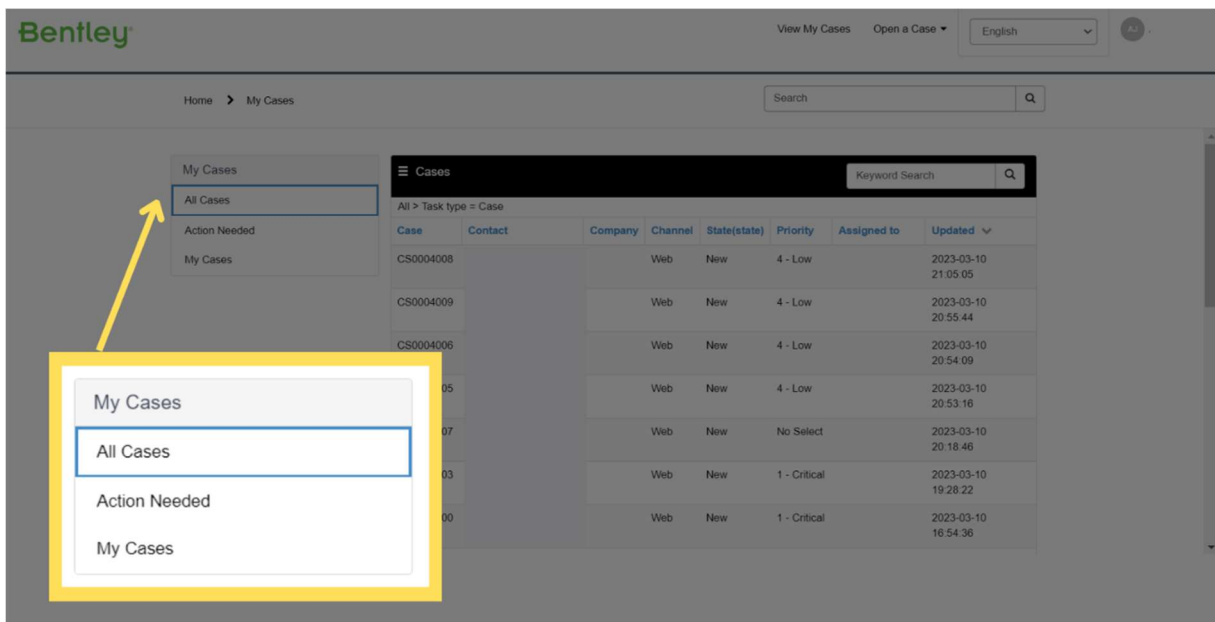


1.7 VIEWING MY CASE – TYPES OF CASE VIEW

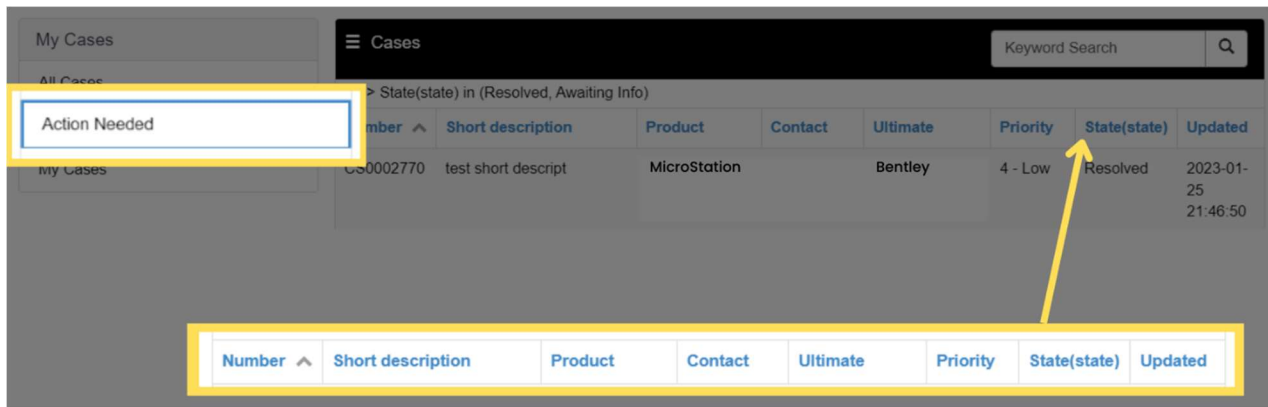
My Cases will display three different types of case view: All Cases, Action Needed and My Cases.

- **All Cases** – refers to all the cases you opened
- **Action Needed** – refers to cases that requires your attention
- **My Cases** – refers to all the cases that you submitted (active and resolved)

The default view is **All Cases**. You can access any case on this list by clicking on the case record locator.



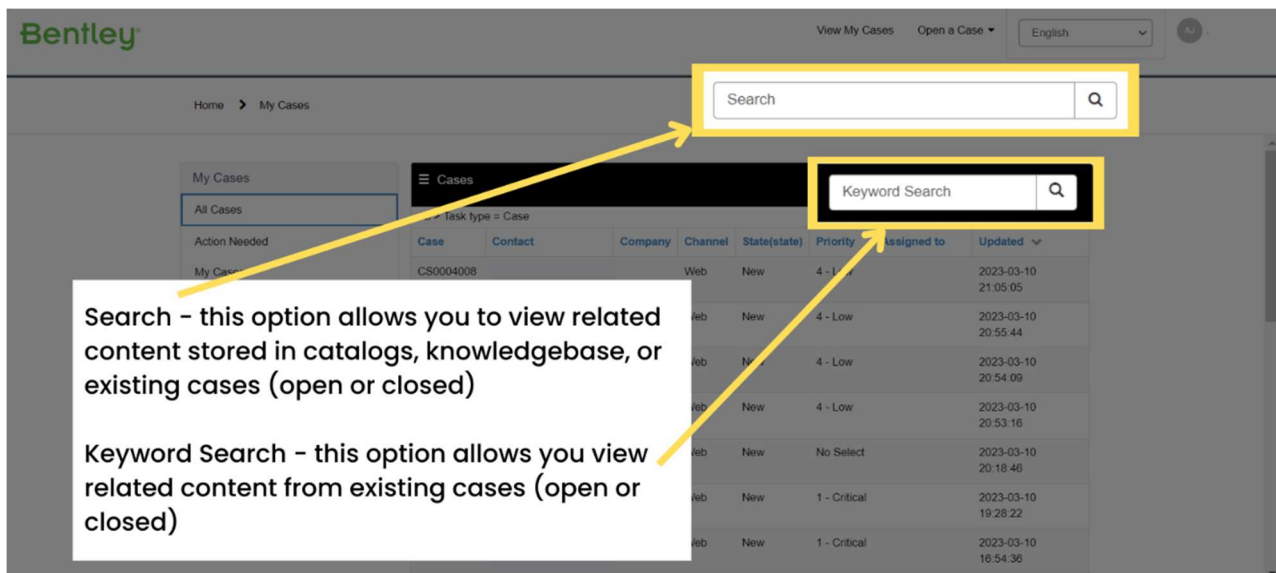
To view cases that require your attention, click on the **Action Needed** option under My Cases.



Note: You can review these cases to provide additional information to Bentley Support as well as accept or reject the proposed solution.

1.8 SEARCHING FOR A CASE

To manually search for a case, type in your case number on the search or keyword search field.



1.9 FILTERING CASES

This option allows you to sort cases by case number, description, product name, contact (user reported), ultimate contact (company contact), priority, case state and date and time of when the case was last updated.

To use the filter option, click on the field that you wish to sort. An arrow will appear on the side allowing you to sort the data an ascending or descending value.

My Cases

Cases

Keyword Search

All > State(state) in (Resolved, Awaiting Info)

Number	Short description	Product	Contact	Ultimate	Priority	State(state)	Updated
CS0002770	test short descrip	microStation	Bentley	4 - Low	Resolved	2023-01-25	21:46:50

- Click on the column field that you wish to sort to launch the sorting arrow
- Click on the arrow to sort in a descending or ascending order

1.10 EXTRACTING CASES

For reporting purposes, you can extract your cases as PDF, Excel or CSV files.

Click on the hamburger icon to export the cases to your preferred file format.

My Cases

Cases

Keyword Search

All Cases

Action Needed

My Cases

- Export as PDF
- Export as Excel
- Export as CSV

Click on the hamburger icon and select the file format that you wish to extract.

UPDATING CASES

After you click on your case number, you will be redirected to the **View My Cases** page.

In your portal, you will be able to see your cases and all activity updates on status of the case.

1.11 GETTING FAMILIAR WITH VIEW MY CASES PAGE

To understand how the View My Cases page works, let us get familiar on what information is available to you:

The screenshot displays the Bentley Support portal interface. At the top, there's a navigation bar with 'View My Cases' and 'Open a Case' options. Below that, a breadcrumb trail shows 'Home > My Request - CS0004007'. The main content area features a table of cases. The first row is highlighted with a yellow box and numbered callouts 1 through 4. Callout 1 points to the 'Number' column (CS0004007). Callout 2 points to the 'Created' column (just now). Callout 3 points to the 'Updated' column (just now). Callout 4 points to the 'State' column (New). A callout box at the bottom of the screenshot provides the following definitions:

1. Case Number - assigned reference/ticket number
2. Created - time/date the ticket remains open from the time it was created
3. Updated - time/date the ticket was last updated
4. State - status of the ticket

1.11.1 Case Number

Refers to the case number assigned to the you when the case created through Bentley Support or Bentley Support Portal.

1.11.2 Created

The time/day that the case remains open from the moment it was created

1.11.3 Updated

Refers to the time/day when the case was last updated

1.11.4 State

Refers to the status of the case

- **New** – case has been recently opened and is waiting to be assigned to Bentley Support
- **Awaiting Info** – Bentley Support needs additional information from you to be able to continue working on the issue/request
- **Work in Progress** – Bentley Support is in the process of resolving the issue/request
- **Pending with Development** – case has been elevated to our Development Team for their review
- **Resolved** – the issue/request has been resolved; Bentley Support verifies resolution with you
- **Cancelled** – the case was opened in error, or the issue resolved itself without the need of assistance from Bentley
- **Closed** – the case is in Resolved state and can be closed when you accept the resolution; you were provided the resolution but did not respond within stipulated time frame and system auto closes the case; or the case was closed as it was pending additional information from you and no reply within the stipulated time frame.

The screenshot displays a Bentley Support Portal interface for a case with ID CS0004007. The case title is "Bentley Support Portal Test Case" (5). The description is "This is a Bentley Support Portal test case." (6). The contact information shows "Ultimate Bentley" (7) and "Contact Angela Jose" (8). The product is "ADINA" (9). The case state is "New".

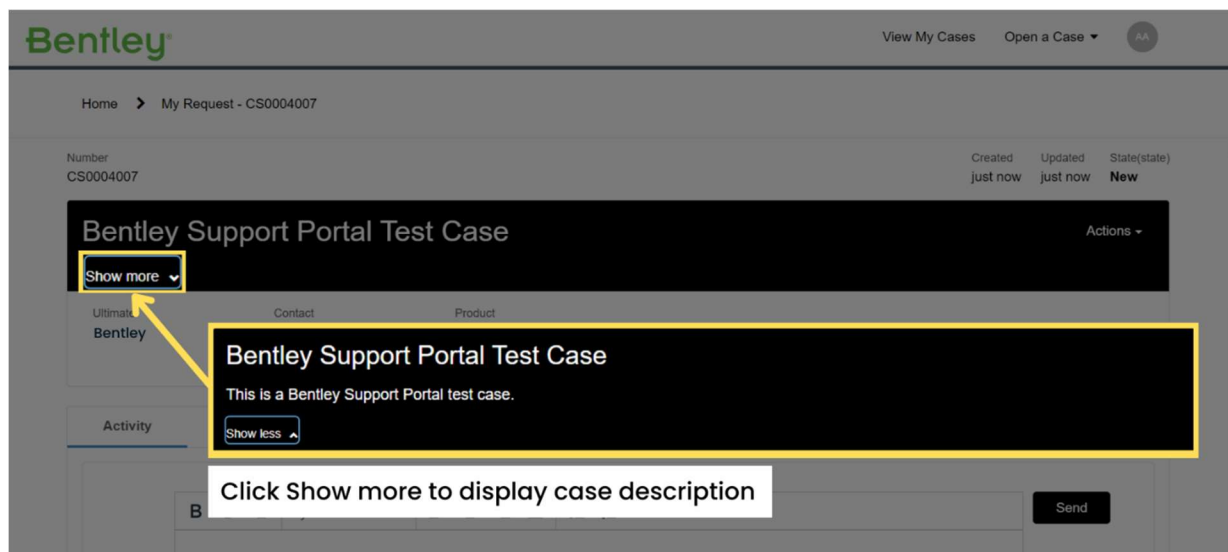
5. Short Description – briefly describes the issue/request
 6. Description – information provided to describe the issue in detail
 7. Ultimate – the company’s main contact
 8. Contact – name of the requestor or the person who submitted the request
 9. Product – product name indicated when the request was submitted

1.11.5 Short Description

Refers to the information you added to briefly describe the issue/request

1.11.6 Description

Refers to the information you provided to describe the issue in detail



1.11.7 Priority

Refers to the level of importance that the case needs to be attended to. See below:

- **4 Low** – no downtime reported
- **3 Medium** – single system impacted
- **2 High** – many systems impacted
- **1 Critical** – all systems impacted

1.11.8 Ultimate

Refers to the company's parent client/account name as registered in Bentley client database

1.11.9 Contact

Refers to the name of the person who submitted the request. Your name should be listed in this section.

1.11.10 Product

Refers to the name of the product you specified when you submitted the form

The screenshot shows a web interface for a support case. At the top, the case number is CS0004007. The page has a dark header with 'Bentley Support' and 'Case Details' visible. Below the header, there are tabs for 'Activity' and 'Attachments'. A yellow box highlights these tabs. To the right, there is an 'Actions' dropdown menu, also highlighted with a yellow box and an arrow pointing to it. Below the tabs, there is a text input area with a rich text editor toolbar containing bold (B), italic (I), underline (U), and font selection (System Font) options. A yellow box highlights this toolbar and the text area. A 'Send' button is located to the right of the text area. A white text box with a black border contains the following numbered list:

- 10. Activity tab - select this to view or add case details
- 11. Attachments tab - select this tab to case-related files
- 12. Additional comments section - section for case-related notes
- 13. Actions drop down menu - allows you to select appropriate action for the case

1.11.11 Activity tab

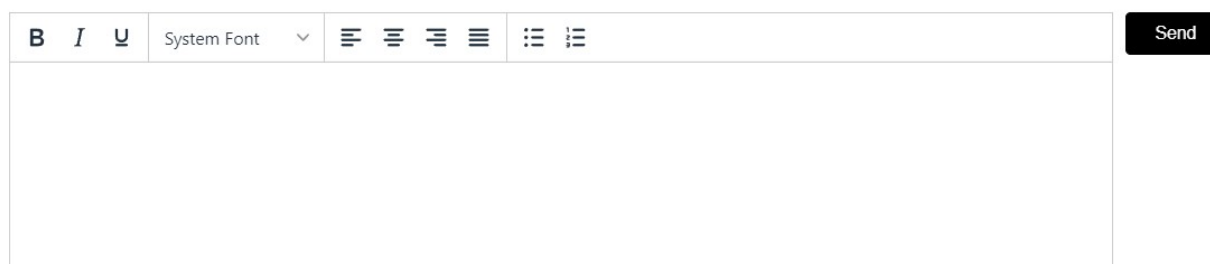
Refers to the section that allows both you and Bentley Support to leave details about the case such as notes and troubleshooting steps. This tab also shows the thread of message exchanges from newest to oldest.

1.11.12 Attachments tab

Refers to the section that allows both you and Bentley Support to attach additional files relevant to resolving the issue/request. Files can be uploaded by using the drag and drop function or by clicking on the paperclip icon.

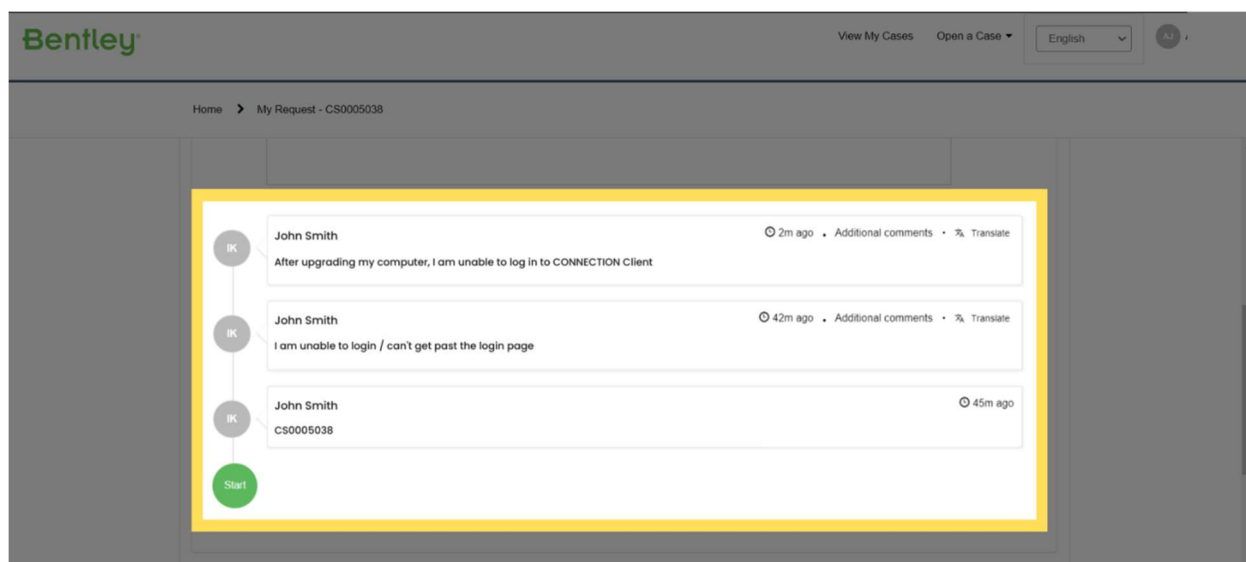
1.11.13 Additional Comments section

Refers to the section where you can communicate with Bentley Support on the case.



1.11.14 Activity view

Refers to the section that shows the history of the case including the name of the person who last made a recent update and time/date the last update was made. The option to translate messages is also available in this view.



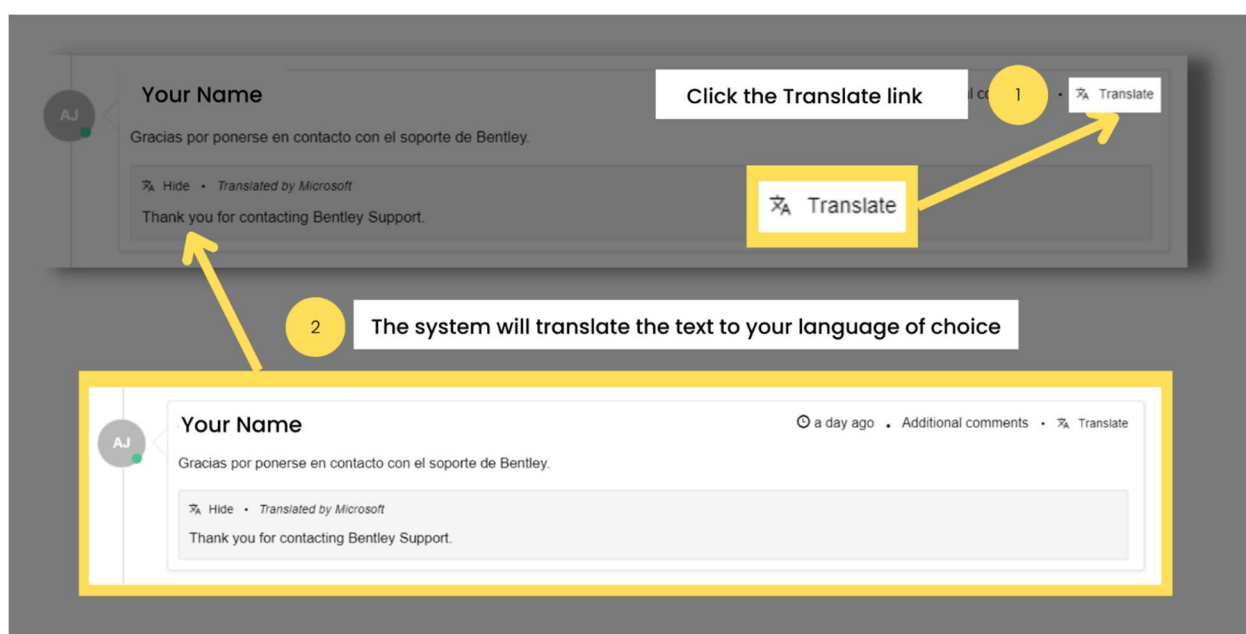
1.12 READING THE ACTIVITY SECTION (CASE NOTES)

The activity section shows the history of the case from the most recent activity to the oldest. To understand the notes, it is best to start from the bottom going up.

You will see all information for: Additional Comments, State, Resolution Notes, Bentley Communities Knowledgebase article link.

1.13 DYNAMIC LANGUAGE TRANSLATION

The Bentley Support Portal has a translation option right in the case! The translate button easily translate text into your preferred language. To translate the text on the activity section to your preferred language, click on the Translate link.



Please note: To translate the text, your preferred language must be set to a language other than English.

Dynamic Language Translation supports the following languages: English, Chinese, Czech, Dutch, French, German, Italian, Japanese, Korean, Polish, Portuguese and Spanish.

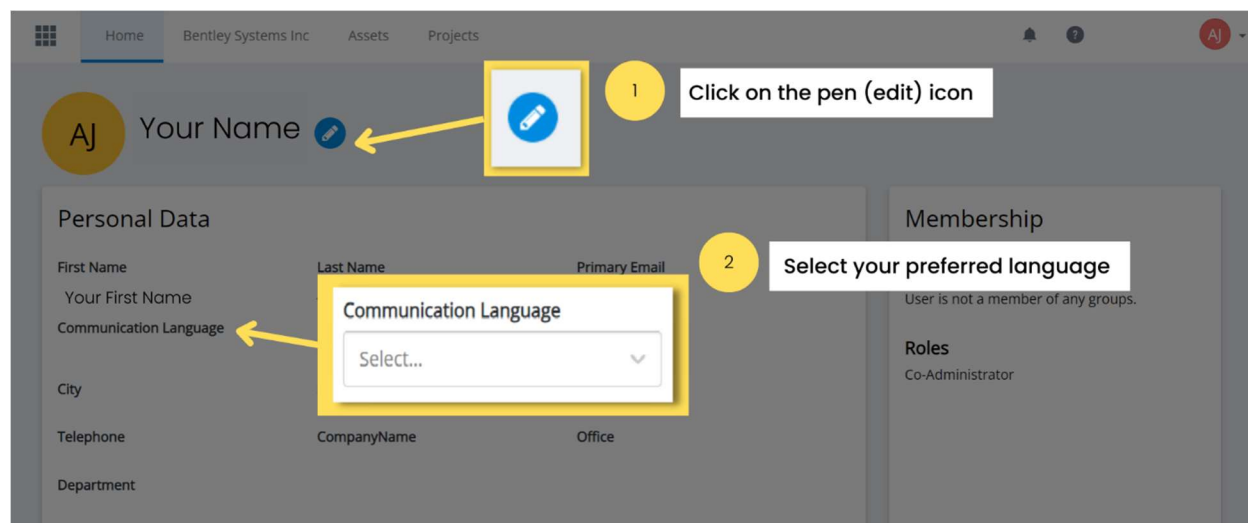
1.13.1 Language Settings

There are multiple ways to set your preferred language, and this can be classified into permanent and temporary setting.

PERMANENT LANGUAGE SETTINGS

If you would like to set your language preference permanently, follow the steps below:

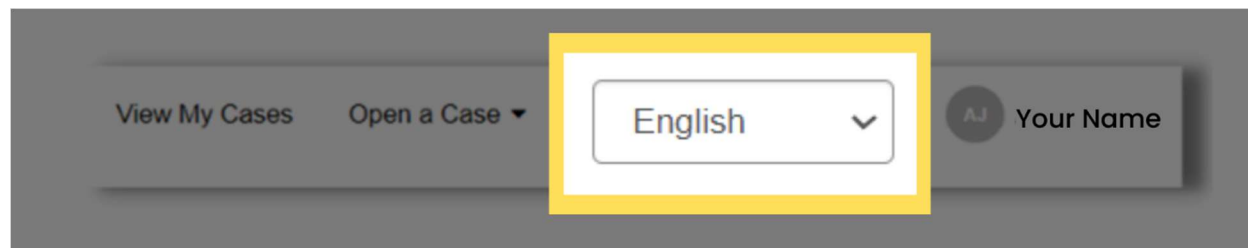
Go to **Your Profile** in User Management to set your language preference for the portal and forms.



Click on the pencil icon to edit your preferred Communication Language. Select your language of choice from the dropdown menu. Scroll towards the bottom and hit save.

TEMPORARY LANGUAGE SETTINGS

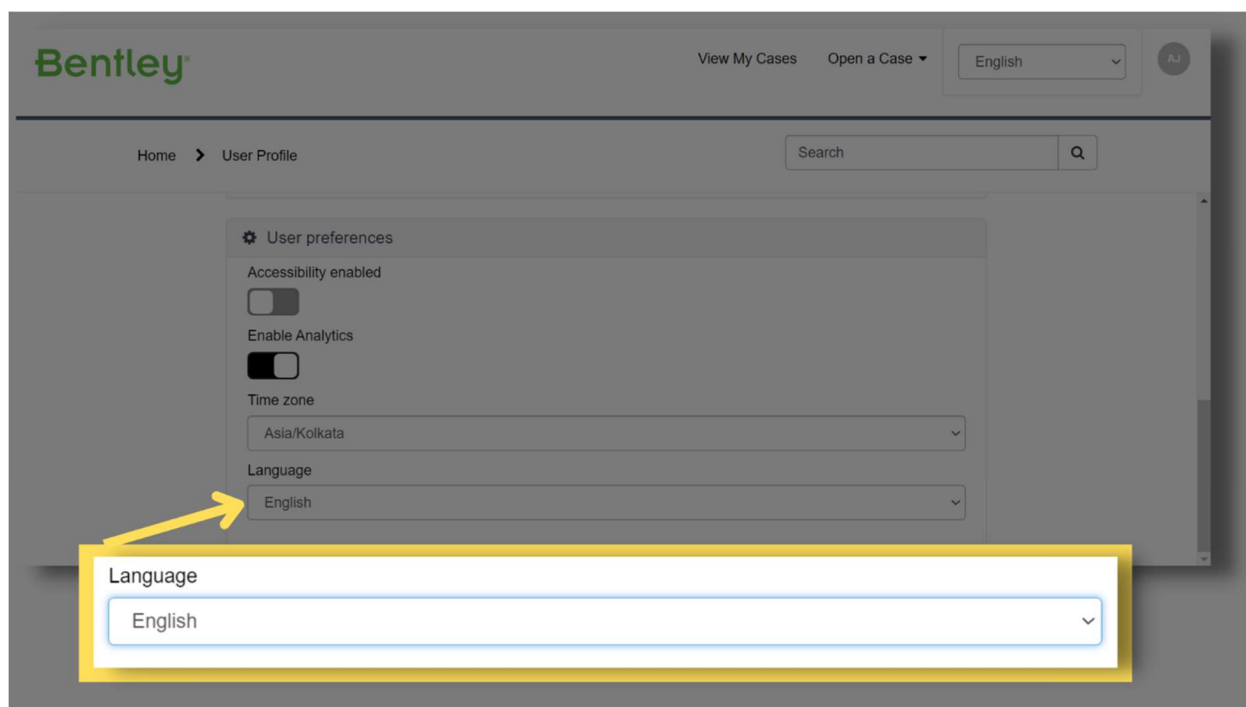
You can also set your language preference within the **Bentley Support Portal** on a temporary basis by logging in to the portal and selecting your language of choice from the drop down menu found on the top right portion of the page.



Alternately, you can also do this within your profile by clicking on your name followed by the Profile link.



You will then be taken to your **User Profile** where you can apply the changes.

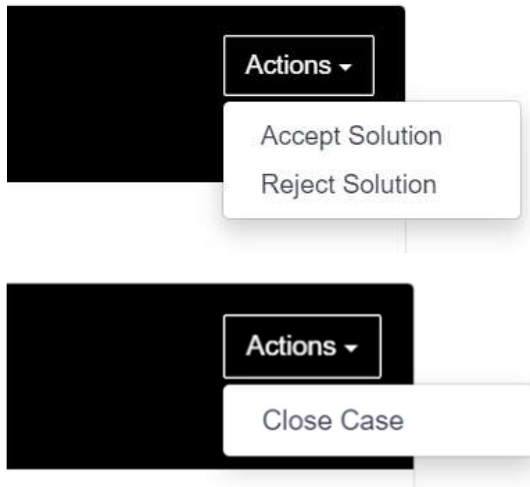


If after viewing the case updates in the activity log and you still need assistance, please contact Bentley Support.

CLOSING THE CASE

The instructions below are to provide an overview of how **you** will close a case:

1. When the case is placed in resolved state, you will be notified of the proposed solution via email.
2. You will be notified that the case is placed in Resolve State with links to **Close Case** (accept resolution provided) or indicate you **Still Need Assistance** (Reject proposed resolution).
3. You can either respond via the email links or open the case in the portal. If you open the case in portal and see the Actions bar with the option to select Accept or Reject Solution.



4. Select **Accept Solution** if your issue/concern was resolved by Bentley. If the proposed solution did not resolve your issue/concern, select **Reject Solution**.

5. The case will automatically close once you select **Accept Solution**. When you select **Reject Solution**, the case status is reverted to **Work in Progress** and is re-assigned to the queue.

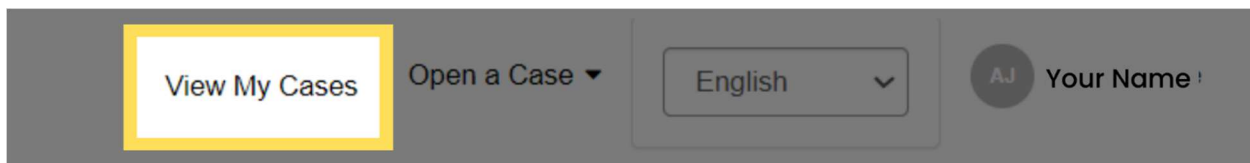
6. If you encounter an instance where the issue raised was resolved on its own or the case was raised in error, you have the option to close the case. You can close the case by clicking on the action dropdown button and selecting **Close Case**.

CHECKING CASE STATUS AND OWNERSHIP

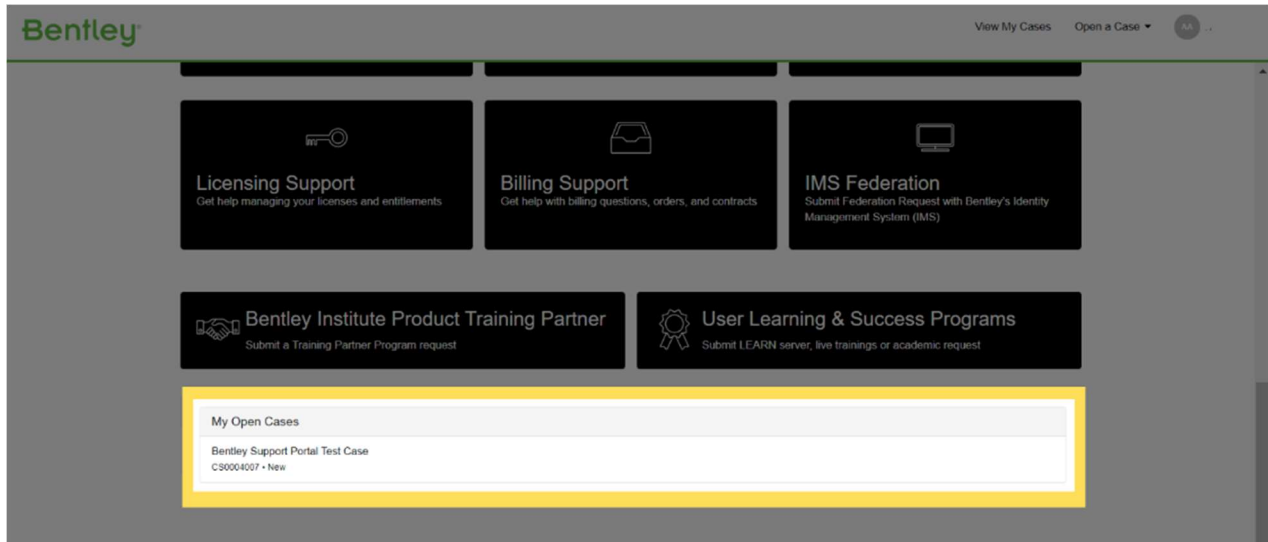
1.14 VIEWING CASES

To view or manage your existing cases, click on **View My Cases** from the top-right menu or hover towards the bottom section of the Bentley Support Portal homepage.

Option 1: Click on **View My Cases** from the top-right menu



Option 2: Hover towards the bottom section of the Bentley Support Portal homepage and select **My Open Cases**



1.15 FILTERING CASES

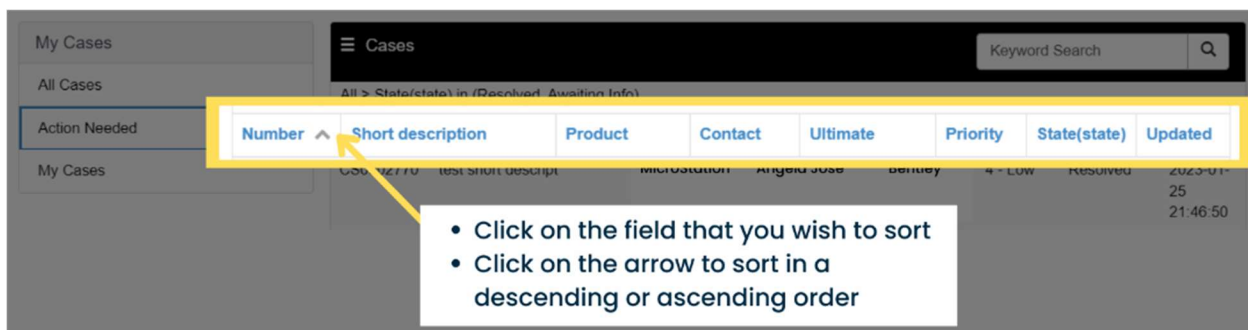
After clicking on View My Cases, the **My Cases** page will open.

To view cases that require your attention, click on the **Action Needed** option under My Cases.

To sort cases that requires attention:

To use the filter option, click on the field that you wish to sort. An arrow will appear on the side allowing you to sort the data an ascending or descending value.

You can sort cases by case number, description, product name, contact (your name), ultimate contact (company contact), priority, and date and time of when the case was last updated.



You can also sort the cases based on their state:

- **New** – case has been recently opened and is waiting to be assigned to Bentley Support
- **Awaiting Info** – Bentley Support needs additional information from you to be able to continue working on the issue/request
- **Work in Progress** – Bentley Support is in the process of resolving the issue/request
- **Pending with Development** - case has been elevated to our Development Team for their review
- **Resolved** – the issue/request has been resolved; Bentley Support verifies resolution with you
- **Cancelled** – the case was opened in error, or the issue resolved itself without the need of assistance from Bentley
- **Closed** – the case is in Resolved state and can be closed when you accept the resolution; you were provided the resolution but did not respond within stipulated time frame and system auto closes the case; or the case was closed as it was pending additional information from you and no reply within the stipulated time frame.

The screenshot shows a table of cases with the following columns: Number, Short description, Product, Contact, Ultimate, Priority, State(state), and Updated. A yellow box highlights the 'Action Needed' dropdown menu for the first case. Another yellow box highlights the 'State(state)' column header, with an arrow pointing to it from a text box below. The text box contains the following instructions:

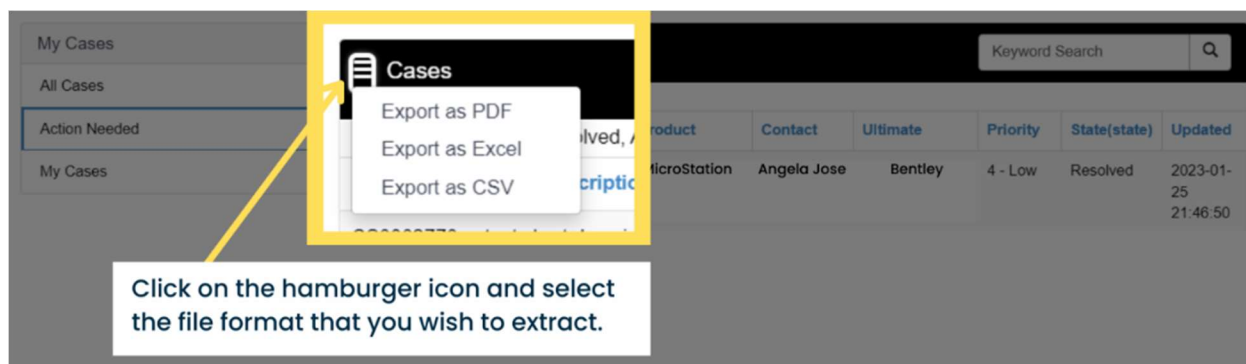
Sorting cases based on State:

- Click on the State column
- Click on the arrow to sort cases by their status
- Select the cases with Awaiting Info to update the required information

Once the result is generated, you can immediately view the case state and the date the case was last updated. Click on the case number if you wish to view the full details of the case.

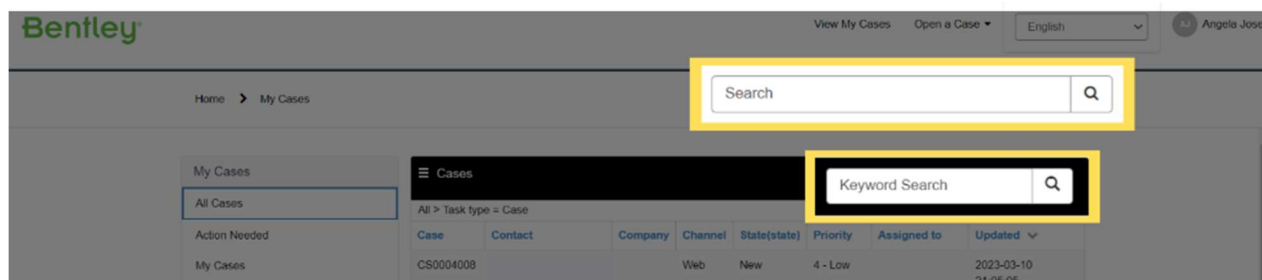
1.16 EXTRACTING CASES

Click on the hamburger icon to export the cases to your preferred file (PDF, Excel or CSV) format.



1.17 SEARCHING FOR A CASE

You can manually search for a case when the case number is known. To search for a case, type in your case number on the search or keyword search field.



- **Search** – this option allows you to view related content stored in catalogs, knowledgebase, or existing cases (open or closed)
- **Keyword Search** – this option allows you view related content from existing cases (open or closed)

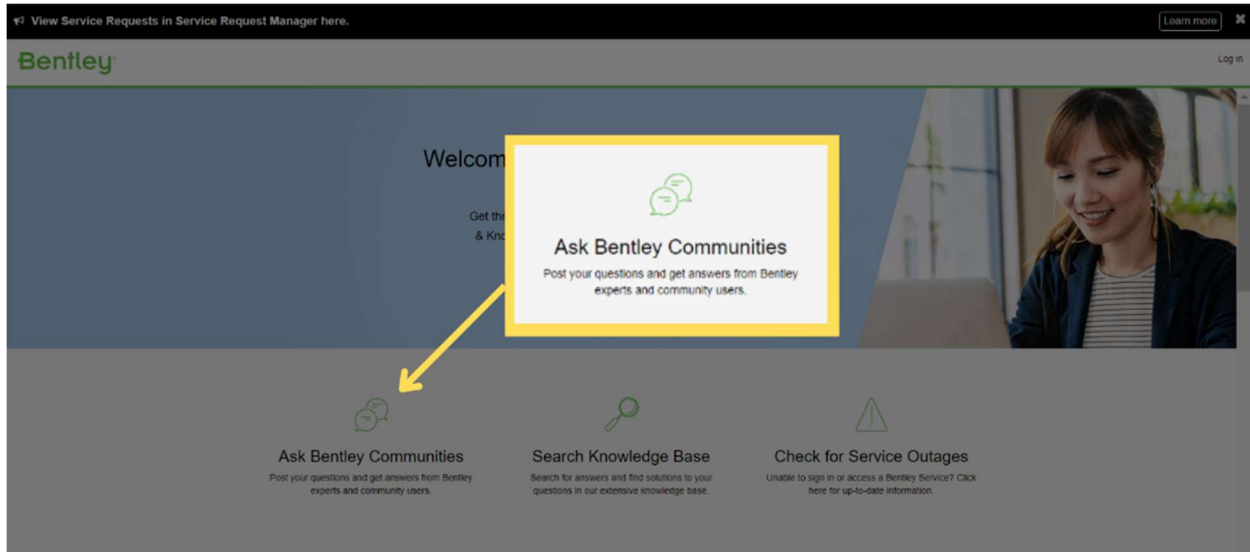
OTHER FEATURES

1.18 BENTLEY COMMUNITIES

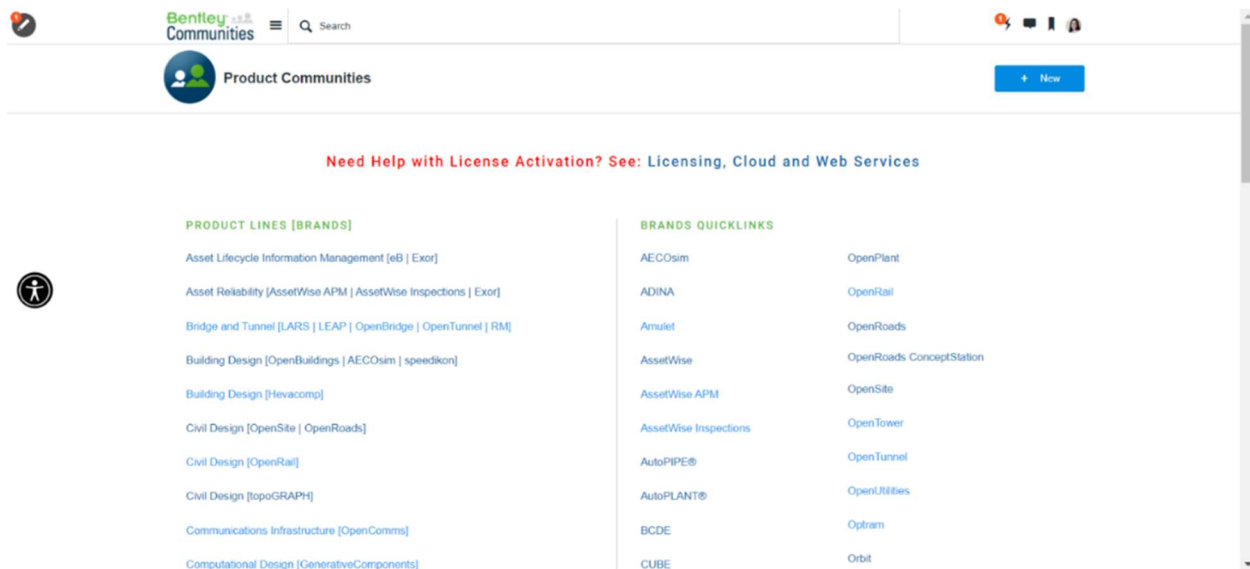
1.18.1 Ask Bentley Communities

This button takes you to the Bentley Communities product page

(<https://communities.bentley.com/products>) where you can search by product line or brand name.

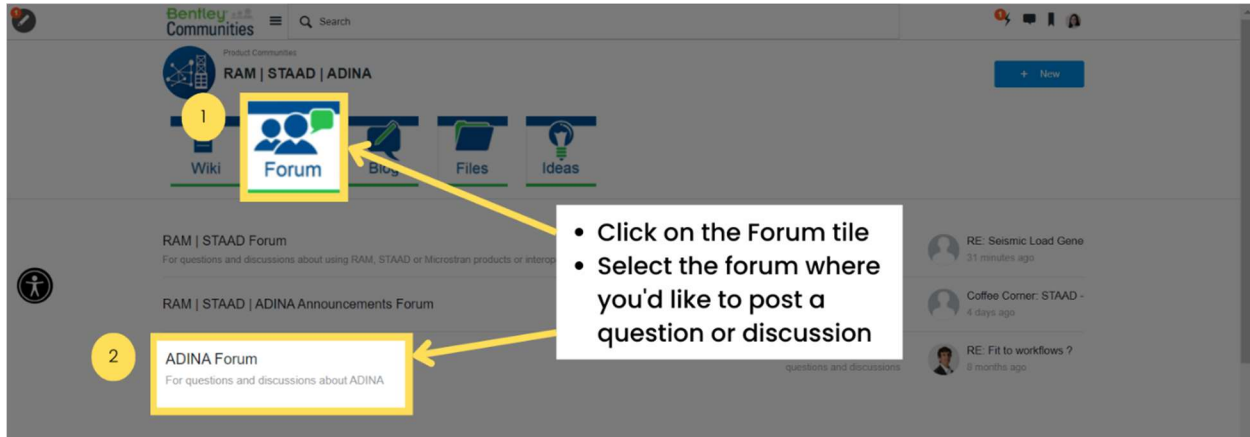


Select the product or brand name to launch the community page.



Select the product line or brand name of the community you wish to visit.

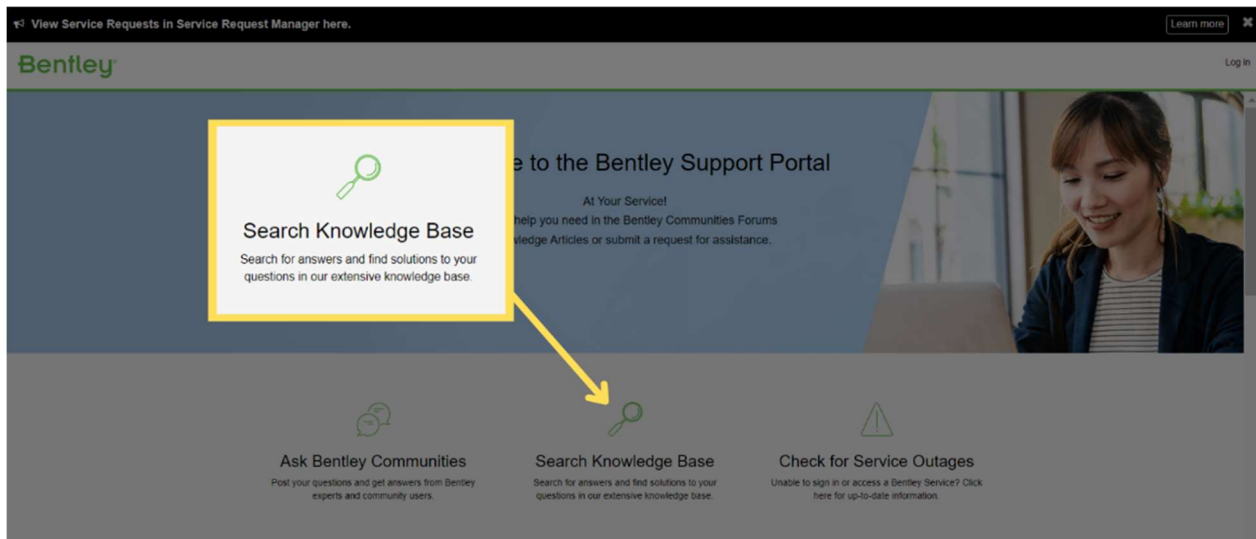
Once you have landed on the product community page, click the Forum application button to launch the available forums.



Note: One product community may have multiple forums.

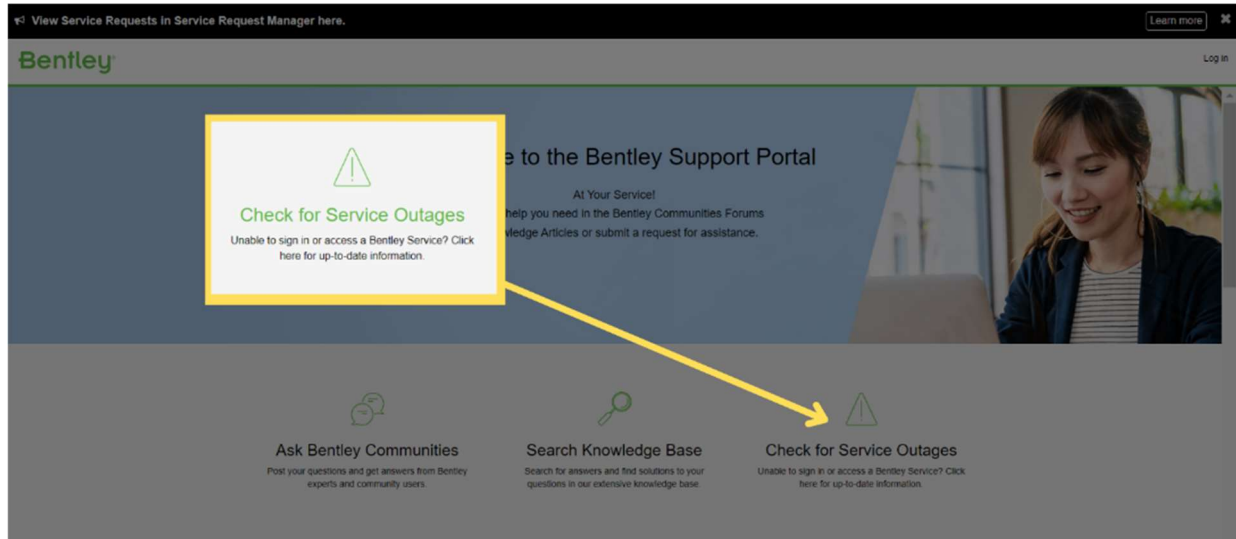
1.18.2 Search Knowledge Base

This button takes you to the wiki article section in Bentley Communities.



1.19 BENTLEY SOLUTION OUTAGES

This button takes you to the Bentley Systems health dashboard page where you can check the outage status of Bentley products and services.









Bentley Cloud Services Status

Welcome to Bentley Systems health dashboard. Here you can follow the operational status of our products as well as other key features and services.

Any issue or interruptions we encounter will be listed on this page.

[Subscribe To Updates](#)

 **All systems are up & running**

 Operational  Degraded Performance  Partial Outage  Major Outage  Maintenance