

Content Services IDEA2 Online Demo System

Manual

TMDEMO ID:		Version:
IDEA2MANUAL		3.3
Click for:	Support	Latest Version



Revision History

Version 3.3.	January 21 st , 2025	Added information about One Demo Service Portal for OpenText staff. Reflected changed sender email address for password resets and password changes.
Version 3.2	October 16 th , 2024	Update term demo storyboard to demo guide.
Version 3.1	September 9 th , 2024	Updated chapter "Managing your IDEA2 account and password" to reflect password policy and password expiry reminders.
Version 3.00	August 27 th , 2024	Updates with regards to discontinuations of Extended ECM, additional updates
Version 2.00	February 20 th , 2024	Updated password reset URL. Removed references to VPN as we discontinue it.
Version 1.97	July 5 th , 2023	VPN migration to Softether
Version 1.96	June 29, 2022	Minor changes (formatting)
Version 1.95	February 24 th , 2022	Adopted Android VPN
Version 1.94	January 14 th , 2021	Updated demo client information
Version 1.93	August 5 th , 2020	Reflected available additional demo options
Version 1.92	July 22 nd , 2020	Update with regards to MY Support renaming: Enterprise Applications is now replaces with Content Services (KW)
Version 1.91	December 4 th , 2019	Updated link to Known Issues list (PDF in MySupport has been replaced with a web page on tm-support.opentext.com)
Version 1.9	June 13 th , 2019	Added: VPN instructions for Android; switching SAP GUI theme; inventory of IDEA2 demo use cases
Version 1.84	April 3 rd , 2019	Updated URL of IDEA Online Demo Account Request Form for partners
Version 1.83	February 7 th , 2019	Updated "Connect to VPN first" and "Available web user interfaces".
Version 1.8	March 6 th , 2018	Updated chapter "Persistent File Share" to reflect some changes. Removed references to IDEA1.
Version 1.7	September 26 th , 2017	Rebranding with regards to new OpenText/IDEA2 Logo
Version 1.6	July 5 th , 2017	Updated chapter "Access some web user interfaces directly (OpenText staff only)". Added additional notes and sub chapter "Prepare your device". Updated Web UI URLs in sub chapter "Available web user interfaces".
Version 1.5	February 16 th , 2017	Updated "Rules of conduct" and "Access some web user interfaces directly" with regard to risks, and user duties to ensure safety. Removed now obsolete information about rolling out the system to partners. Updated IDEA2 Playback subchapter.
Version 1.4	January 4 th , 2016	Added specific information for partners - who are now entitled to access IDEA2.

Version 1.3	January 4 th , 2016	Replaced references to "Knowledge Center" with "My Support". Reflected structural changes in Demonstrations section in My Support.
Version 1.2	October 25 th , 2016	Updated comparison of IDEA demo options.
Version 1.1	September 22 nd , 2016	Added VPN instructions for Mac users.
Version 1.0	September 21 st , 2016	Initial version for new IDEA2 Online environment

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Conventions

The following typographical conventions are used in this document:

Bold outside of headings

is used for menu labels and variable names

Italic outside of headings

is used for variable values

`Constant width`

is used for code

➔ Indicates a cross-reference within this document.



Indicates preconfigured demo data and settings.



Indicates prerequisites, such as required demo preparation.



Indicates a warning.



Indicates known issues.



Indicates tips and tricks.



Indicates a demo scenario or use case with step-by-step instructions.



Indicates an optional or advanced demo scenario or use case.



Indicates additional information, or a reference to it.

The IDEA2 Online demo environment

About



A popular demo option is connecting to our **IDEA2 Online** demo environment with dozens of installed products and solutions. **IDEA** stands for **I**ntegrated **D**emos for **E**nterprise **A**pplications. **IDEA2 Online** features *Content Services* product versions.

A Terminal Server provides Windows 7 client desktops which you can access with your personal domain user account through a remote desktop connection. This will allow you to run a number of demonstration scenarios. The environment is periodically 'reset' to a known state over the weekend in preparation for the next week's demos.

All information is available in OpenText My Support (formerly "Knowledge Center"):

[IDEA2 Online - Demo Resources](#)

Getting an account



The first thing users will require in order to access IDEA2 Online is a demo system account.

OpenText Staff

Working in IDEA2 Online requires a personal **IDEA2 Online account**, which is also referred to as **EIMDEMO domain user account**.

OpenText Staff please register through the [OpenText IDEA2 User Account Self-Service](#) website as described below. This is an automated procedure which will give you access to the environment within a few minutes.

Note: You cannot connect with your OpenText domain user account.

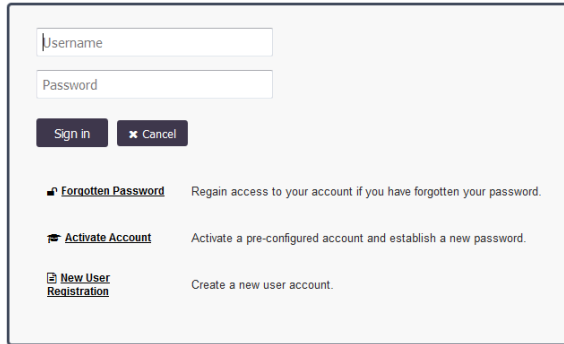
If you need any help with registration, contact tm-support@opentext.com.



The procedure below is **exclusively for OpenText employees**. Partners please refer to ➔ [OpenText Partners](#) (page 10).

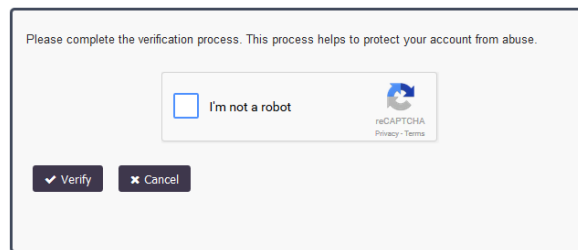
-
1. Open the [OpenText IDEA2 User Account Self-Service](https://ideaaccount.eimdemo.com/) in your web browser:

2. Click New User Registration.



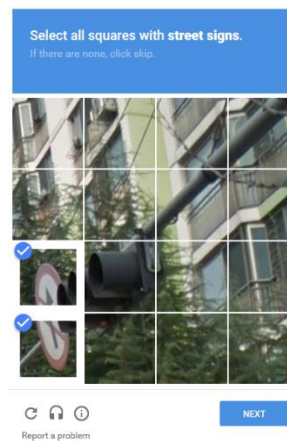
The screenshot shows the login page of the OpenText IDEA2 User Account Self-Service. It features a 'Username' input field and a 'Password' input field. Below these fields are 'Sign in' and 'Cancel' buttons. Further down, there are three links: 'Forgotten Password' (with a key icon), 'Activate Account' (with a key icon), and 'New User Registration' (with a person icon). Each link is followed by a brief description of its function.

-
3. Click I'm not a robot.



The screenshot shows a reCAPTCHA verification page. At the top, it says 'Please complete the verification process. This process helps to protect your account from abuse.' Below this is a checkbox labeled 'I'm not a robot' with a reCAPTCHA logo and 'reCAPTCHA Privacy - Terms' link. At the bottom, there are 'Verify' and 'Cancel' buttons.

-
4. Solve the CAPTCHA challenge.
 5. Click **Next**.



The screenshot shows a CAPTCHA challenge. It features a grid of 12 small images of a street scene. The instruction at the top is 'Select all squares with street signs. If there are none, click skip.' Two squares in the bottom-left corner are marked with a blue checkmark, indicating they have been selected. At the bottom, there are icons for 'Report a problem' and a 'NEXT' button.

6. Now enter your details:
 1. First Name
 2. Last Name
 3. OpenText logon
(Your OpenText domain user name through which you login to your work computer.)
 4. OpenText Email Address
(Must be your own valid OpenText email address, ending with @opentext.com)
 5. Think of a strong password which matches the given password rules, and enter it twice.
7. Click Continue.

The screenshot shows a web form for registering a new account. At the top, it says "To register a new account, please complete the following form." Below this is a blue banner that reads "Your account is ready to be created. Continue when ready." The form fields are: "First Name*" with the value "John", "Last Name*" with the value "Smith", "Your OpenText logon*" with the value "jsmith", and "Your OpenText Email Address*" with the value "jsmith@opentext.com". Below these is the "New Password*" section, which includes a list of password rules: "Password is case sensitive.", "Must be at least 2 characters long.", "Must not include any numeric characters.", "Must not include any symbol (non letter or number) characters.", "Must not include any of the following values: password test", "Must not include part of your name or username.", and "Must not include a common word or commonly used sequence of characters." There are two password input fields, each with a strength indicator. The first field shows "Strength: Good" with a brown progress bar. The second field shows a green checkmark. At the bottom are "Continue" and "Cancel" buttons.

Some hints:

The data entered for First name and Last Name, for logon and for email address must be unique. If you enter data of already existing users, you will get an error message saying "An error has occurred.", or "An IDEA2 account with this user name (or email address) already exists".

If you already have a user account and cannot remember the password, then try **Forgotten Password** from the Account Self-Service homepage or contact Technical Marketing Support.

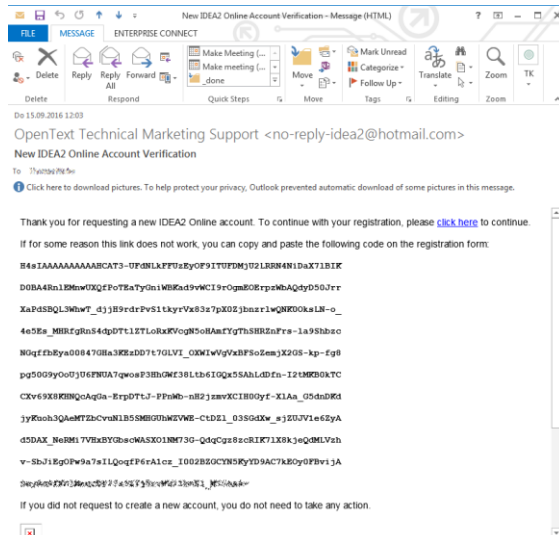
If the logon name is already used and you are sure that this is not associated to an existing IDEA2 account of yours, then choose a different logon name.

If your email is already used, then try **Activate Account** from the Account Self-Service homepage or contact Technical Marketing Support.

If you get "An error has occurred.", then your name already exists. Try **Activate Account** from the Account Self-Service homepage or contact Technical Marketing Support.

8. If you have entered your valid OpenText data, you will be automatically approved and you will get a verification email.
9. Wait a few minutes until you get the verification email from OpenText Technical Marketing Support <no-reply-idea2@hotmail.com> with subject New IDEA2 Online Account Verification.

If you do not receive the email within 5 minutes in your Inbox, then check your spam folder. If it is there, make sure to whitelist no-reply-idea2@hotmail.com. For example, right-click the email in Outlook, then click "Junk" > "Never Block Sender".



10. To complete the registration, follow the instructions in the email:
 6. Either click the **click here** link in the email.
 7. Or copy and paste the code from the email to the **Code** field in the form and click **Check Code**.

To verify your identity, a security code has been sent to you. Please click the link in the email or copy and paste the security code here. If you cannot find the email, please check your spam folder and whitelist "no-reply-idea2@hotmail.com" to your safe senders list. For example, right click the email in Outlook, then click "Junk" > "Never Block Sender".

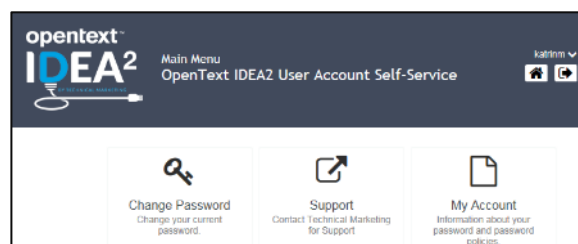
Code

H4eIAAAAAAAAAAHCAT3-UFdNLkFFUzEYOF9ITUFDMjU2LRRN4N1DaX71BIK
D0BA4Rn1BmWUXQfPoTEaTyGniWBKad9vWC19rOgmEOErpzWbAQdyD50Jrr
XaPdSBQ3LWhtT_djJH9rdrPvS1tkyzVx83z7pX02jbnzrlwQNK00ksLN-o_
4eSEa_MHRfgrnS4dpDTt1ZTLorXKvogn5oHAmfYgThSHRZnFrS-la9Shbzc
NGqffhFva00847GHA3KFzDD7t7GLVT_OXWtVvVxRFSn7emX2GS-km-fn8

11. Click Continue.



12. You are now done with creating your IDEA2 account.
13. See next chapter on how to access the demo environment using your new account.



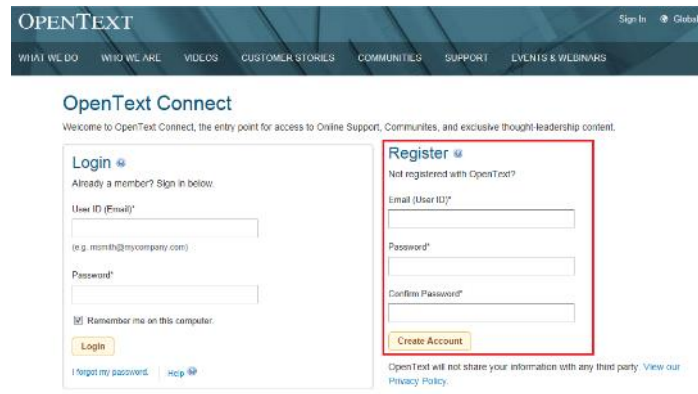
OpenText Partners

Working in IDEA2 Online requires a **personal demo system account**, also referred to as **EIMDEMO domain user account**.

If we didn't provide you an IDEA2 account yet, please submit the IDEA Online Demo Account Request Form, which is available under the following URL, to start a demo system account request:

https://knowledge.opentext.com/go/partner_idea_request

Please note that a partner will require a valid account for OpenText My Support (formerly Knowledge Center) in order to access the IDEA Online Demo Account Request Form. You can apply for a My Support account here: <https://knowledge.opentext.com/>

The image shows a screenshot of the OpenText Connect website. The header features the OpenText logo and navigation links: WHAT WE DO, WHO WE ARE, VIDEOS, CUSTOMER STORIES, COMMUNITIES, SUPPORT, and EVENTS & WEBINARS. The main content area is titled 'OpenText Connect' and includes a welcome message. Below this, there are two main sections: 'Login' and 'Register'. The 'Login' section has fields for 'User ID (Email)' and 'Password', with a 'Remember me on this computer' checkbox and a 'Login' button. The 'Register' section has fields for 'Email (User ID)', 'Password', and 'Confirm Password', with a 'Create Account' button. A red rectangular box highlights the 'Register' section. At the bottom of the 'Register' section, there is a link to 'View our Privacy Policy'.

If all prerequisites have been met, the Technical Marketing team will create the EIMDEMO account for IDEA2 Online and send account details to the requester via email.

Please note that the IDEA2 Online demo system is only available to OpenText employees and OpenText partners contracted to work with OpenText Ecosystem solutions (SAP, Oracle, Microsoft, or Salesforce products).

All OpenText demos can be shown with generic (persona) demo user accounts which can be found in the corresponding demo guides.

Rules of conduct

- Keep in mind that you are sharing the demo environment with others - just as users would do in real life within a company. Our virtual company is called "Innovate", by the way. Multiple customer presentations can run in parallel.
- **Avoid actions that are not described in an official demo guide**
Please avoid all changes to the systems which are not part of the released demo solutions or not necessary to train and prepare your presentations.
- **Do not share your personal user name and password**
Technical Marketing provides personalized accounts for accessing the online demo environment. We need to track and document each and every single user to assure we can support users individually. Please never use login credentials of other users or colleagues – request your own personal account!
- **Be careful about adding/uploading to the demo environment**
Do not upload any confidential content. Do not add content or software that may harm others or infringe the rights of others.
- **Never end other people's SAP sessions**
Logging into SAP: Generic user ID's are used for many demo scenarios and SAP allows the same user to be logged in multiple times. When you log into SAP, if a colleague is also logged in as the same user you will be presented with a choice to end all other logins or proceed without ending other logins. Please take an extra moment to ensure that you do not choose to end other logins.
- **Do not steal other people's (VIM) Workflows**
Special requirements for VIM Demos: We are receiving an increasing number of reports of workflows being processed by other colleagues. Most VIM users are using invoice templates with their initials as part of the invoice number to identify them as their own. Regardless of how you identify your own invoices, please check to ensure that the invoices you are processing through the VIM workflows are indeed your own. You should never process other colleagues' workflows under any circumstances.
- **Do not change (VIM/Fiori) layout settings**
Please avoid changing all available default layout settings for Fiori, or VIM reports such as VIM Analytics, ICC Monitor, Integrated Invoice Cockpit as well as central reporting. These changes do have an immediate impact on all ongoing customer presentations.
- **Don't change user interface language for any *shared* user accounts.**
Do not change the language for a shared user in applications, such as "jbenham" user. Changing the language for shared accounts will directly impact your colleagues who run demos in parallel to yours, or afterwards. Often, they will not even be able to switch the language back if they do not understand the language, you have changed it to.
Please login with localized user accounts instead – where available.

- **Don't touch other people's documents and data!**
Create own demo data and documents: If you need to present changes, deletion or processing of data or documents please make sure to create the necessary items beforehand! Please never change, delete or process items which you did not create on your own. This could affect the important customer presentation of your co-workers in the demo system!
- **It's OK to change language for your *personal* account, or applications that support *independent, individual* sessions.**
You are welcome to set your preferred language or region in any *personal* account - such as your personal Windows user when you access the demo system through Terminal Server (available soon). Or in applications where you can set a login language for your *individual session* with no impact on other parallel sessions - such as SAP GUI or SAP NetWeaver Business Client.
- **Logoff** - not just disconnect - your remote Desktop session when you are done, thus releasing resources for other users and avoiding re-connection issues when you logon next time.
- A little attention to these details will go a long way toward being courteous to your fellow demo system users. Please let us know if you have any questions regarding how to avoid the above problems.

Thank You!

Accessing IDEA2 Online

You can access IDEA2 Online through different ways. Find an overview and detailed instructions below.

Before You Start



Thanks for reading and understanding our ➔ Rules of conduct (page 12) before working in IDEA2 Online.

Ways to access IDEA2 (Overview)

Access to	Platform	Software
Demo Client (Remote Connection) <i>Available for: OpenText staff and partners</i>	Windows	Via Windows Remote Desktop Connection
	Windows	Via Windows RemoteApp and Desktop Connections
	Windows	Via Internet Explorer
	OS X (Mac)	Via Microsoft Remote Desktop App

Connect to demo client

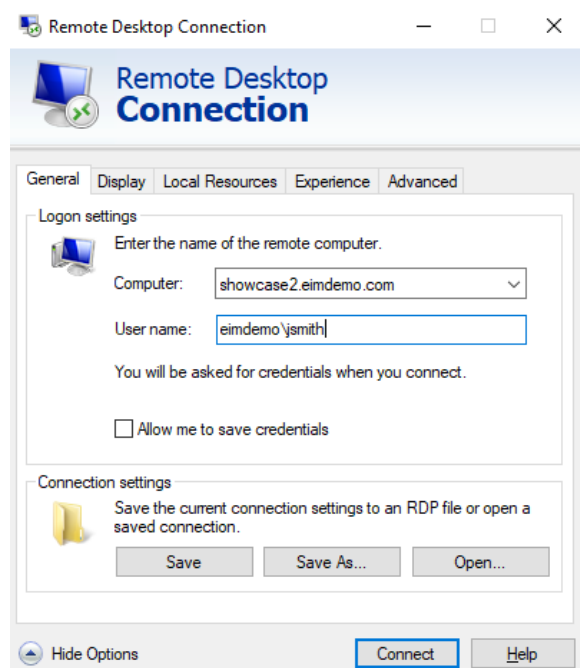
From Windows

Via Windows Remote Desktop Connection

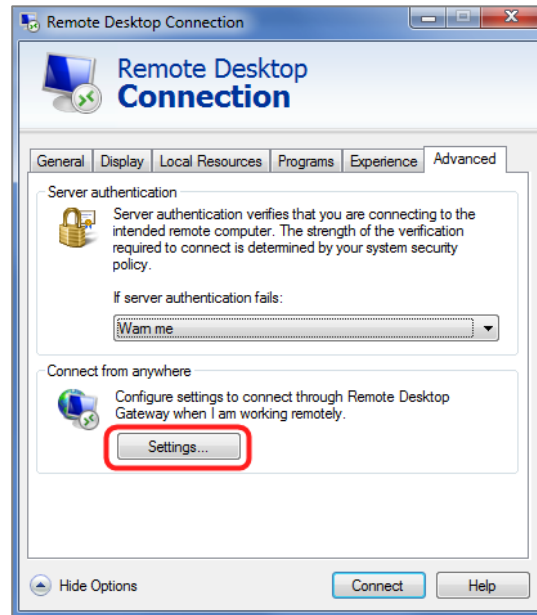
We recommend that you download [this preconfigured RDP connection file](#), right-click it, replace username with your user, and continue with step 6 below.

Or setup an RDP connection yourself as described below.

1. Open All Programs > Accessories > Remote Desktop Connection and click Show options.
2. Enter
Computer: *showcase2.eimdemo.com*
Enter your EIMDEMO user name and password:
eimdemo\username



-
3. Click **Advanced** tab. Click **Settings...**



4. Check **Use these RD Gateway settings:** and make the following settings:

Server name: *showcase2.eimdemo.com*

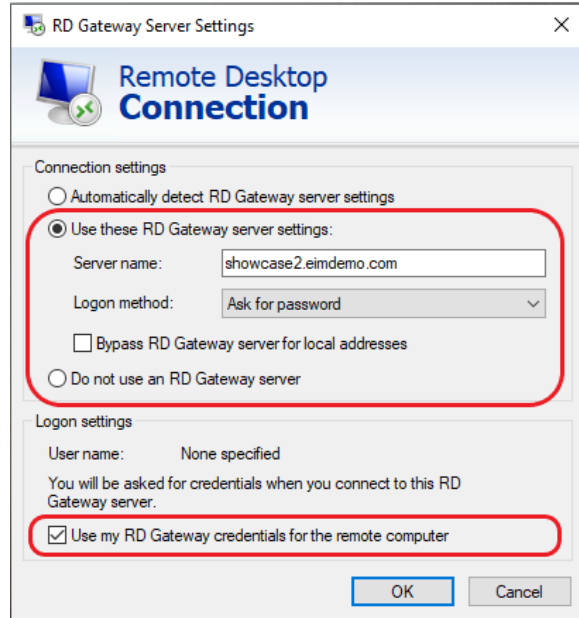
Logon method: *Ask for password*

(No:) Bypass RD Gateway server for local addresses

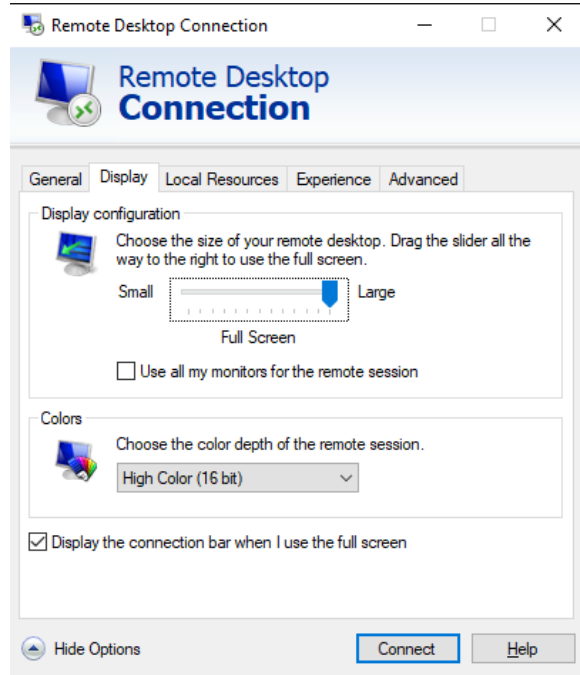
(Yes:) Use my RD Gateway credentials for the remote computer

Note: This will ensure that you need not enter your credentials twice when connecting. Only in case you have any issues with logging on, we recommend to uncheck this box for troubleshooting.

The above settings will make sure that you are able to connect via Remote Desktop (via https), even if you are in a network with strict firewall limitations.

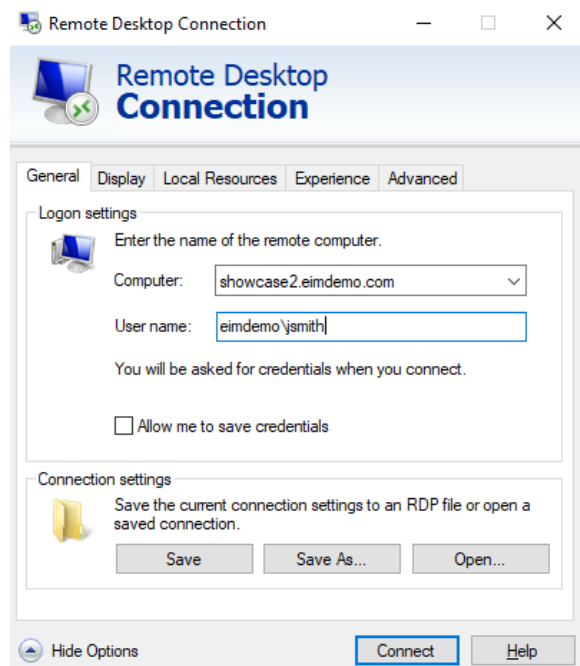


5. You may want to customize display settings.

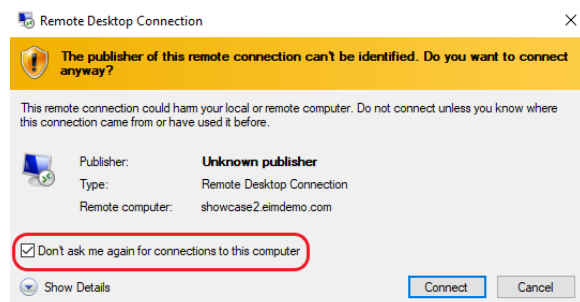


6. Click *Save* or *Save As* to save your settings for later use.

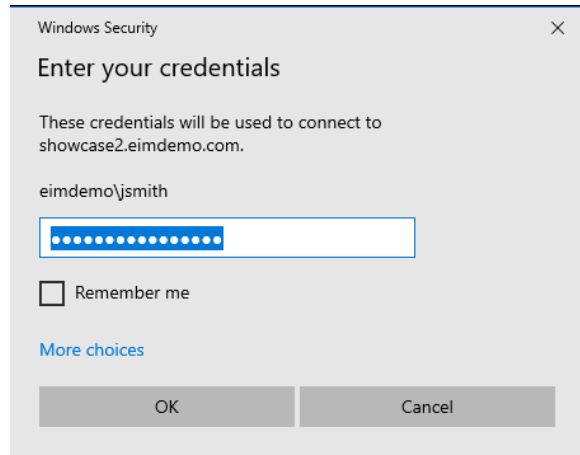
Then click **Connect**.



7. If you get security pop-up, select not to ask again, and click **Connect**.



8. If prompted, authenticate again with your EIMDEMO domain user name and password. Click **OK**.

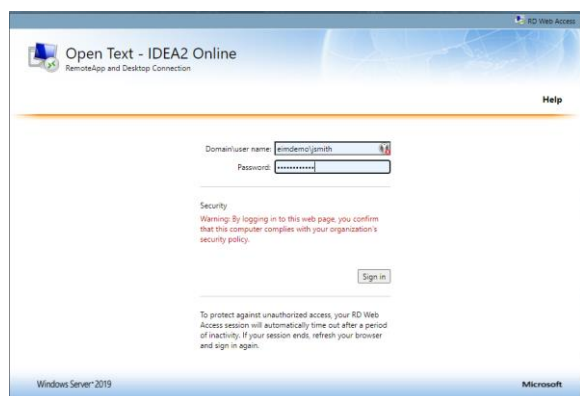


9. You are now connected to the demo client.

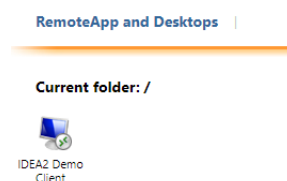


Via Browser

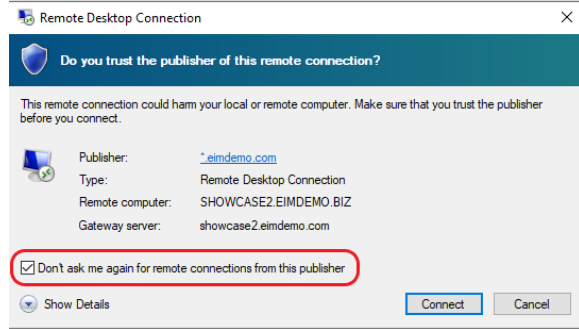
1. Start Browser and open:
<https://showcase2.eimdemo.com>
2. Authenticate:
Enter your EIMDEMO user name and password:
`eimdemo\username`



3. Click the **IDEA2 Demo Client** icon to start a demo client.
Some Browsers don't start it directly but download an RDP file. If that is the case start the downloaded RDP file.



4. To confirm that you trust the server, click **Connect**.



5. If prompted, authenticate again with your EIMDEMO domain user name and password. Click **OK**.

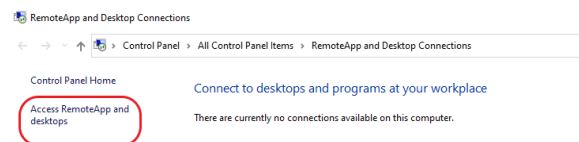


6. You are now connected to the demo client.



Via Windows RemoteApp and Desktop Connections

1. Open RemoteApp and Desktop connections in Control Panel



2. Enter Connection URL:

<https://showcase2.eimdemo.com>

and click **Next**.

Enter your email address or connection URL

Email address or connection URL:

Examples:

https://contoso.com
https://contoso.com/api/feeddiscovery/webfeeddiscovery.aspx
https://contoso.com/rdweb/feed/webfeed.aspx
john@contoso.com

3. Click Next.

Ready to set up the connection

Connection URL: https://showcase2.eimdemo.com

Windows is ready to add available resources (programs and desktops) from this connection to your computer. To continue, click Next.



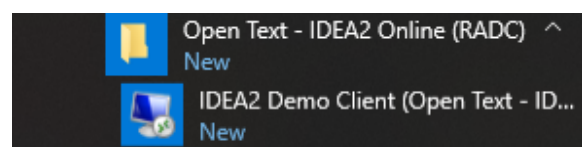
If you continue, links to remote programs, files, and computers will be downloaded and added to your computer. These links will be updated periodically and automatically from the connection URL. Don't continue unless you recognize the connection URL above and know where it came from.

[Next](#) [Cancel](#)

-
4. Authenticate:
Enter your EIMDEMO user name and password:
eimdemo\username
 5. Click **OK**.

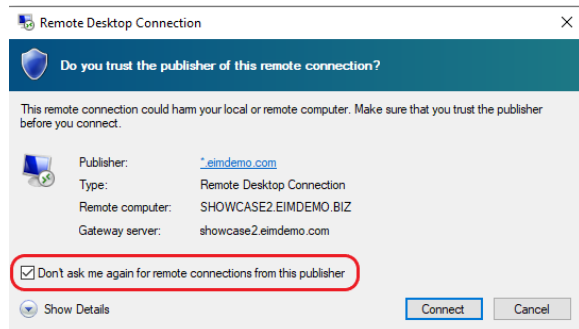
Connect to desktops and programs at your workplace

-
6. Once you have setup the connection, you will find a shortcut to the demo client in the Start menu of your computer. Follow the shortcut in order to connect to the demo client:
Start > Open Text – IDEA2 Online

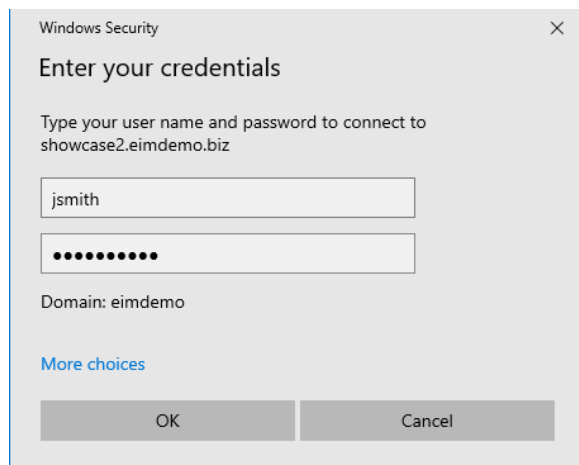


(RADC) > IDEA2 Demo Client ...

7. If you get security pop-up, select not to ask again, and click **Connect**.



8. If prompted, authenticate again with your EIMDEMO domain user name and password. Click **OK**.



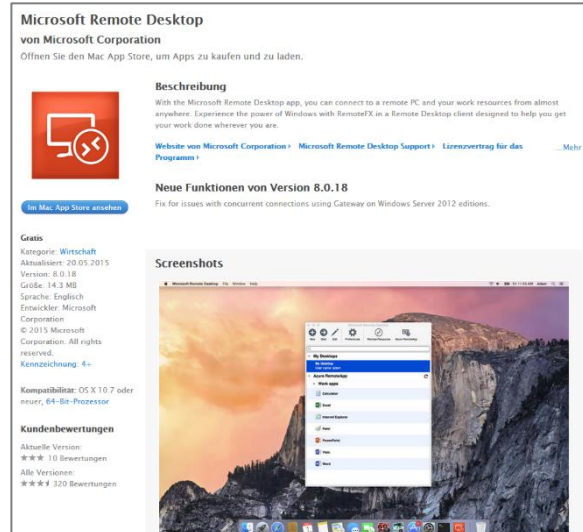
9. You are now connected to the demo client.




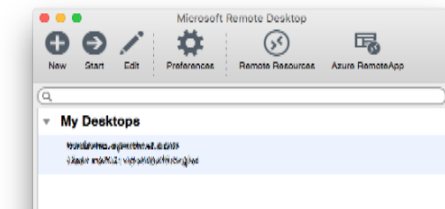
From a Mac

Via Microsoft Remote Desktop App

1. To establish a connection from a Mac please install the current version of the Microsoft Remote Desktop Application.



2. Start the application, click  (New) to add a new desktop connection.



Edit the connection settings as given below:

Connection

Name: *showcase2.eimdemo.com*

PC Name: *IDEA2 Online*

Gateway*: *showcase2.eimdemo.com*

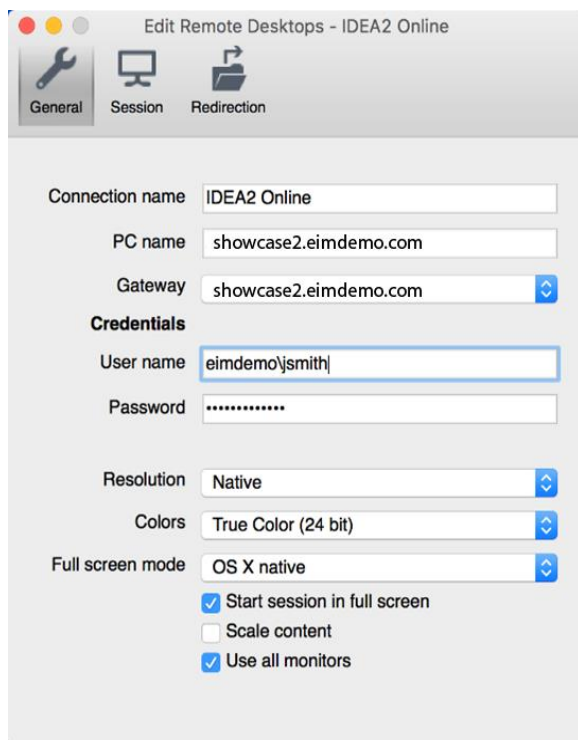
User name: (Make sure to enter your user name with the domain prefix:
eimdemo\username)

Password: (Enter your EIMDEMO account password)


Resolution: *Native*

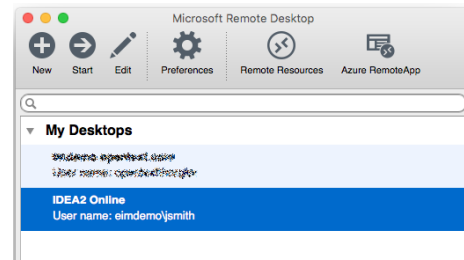
Colors: (Choose any. Note that lower color quality may increase performance.)

* The gateway setting will make sure that you are able to connect via Remote Desktop (via https), even if you are in a network with strict firewall limitations.



-
3. To connect, select the PC name (*IDEA2*

Online) and click  (-> Start)



4. Wait until you are connected to the demo client.



Demoing a product or solution

Once you received your user account and password, you are technically able to access IDEA2 Online through a demo client.

Now you may wonder what products and solutions you can demo, and how you do that.

Read the product-specific demo guide first!

This is the right time to login to My Support and get the demo guide for the solution that you are going to demonstrate:

[IDEA2 Online - Demo Resources](https://knowledge.opentext.com/go/IDEA2DOCU)
(<https://knowledge.opentext.com/go/IDEA2DOCU>)

We have collected all IDEA2 related material there.

Within this folder, you will find all available demo scenarios, including the respective demo guides, available screencam recordings, and other related information.

Now **pick a scenario, download the respective demo guide** and read it. You may then want to do a dry run of the scenario, before you actually demonstrate it to a prospect or customer. It is essential that you follow the steps described in the demo guide. **Anything not described in the guide is not supported, and may even negatively impact other users!**

We recommend to check for demo guide updates and known issues frequently – ideally before every customer demo:

- Get the latest demo guide version through clicking the “Latest version” link on the cover page in your downloaded guide. Or look for the latest version through the [IDEA2 Online - Demo Resources](https://knowledge.opentext.com/go/IDEA2DOCU).
- Check for current issues and system health at <https://tm-support.opentext.com/issues/>
- Check the [IDEA2 Online - Inventory](https://knowledge.opentext.com/go/IDEA2DOCU) for currently available (or unavailable) demos and scenarios – across all products.

Reminder: Please make sure to read and understand the ➔ Rules of conduct (page 12) before working in IDEA2 Online.

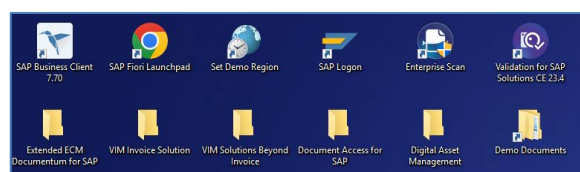
The following sub-chapters describe some common features of the demo client – available across products and scenarios.

Finding demo resources on the client

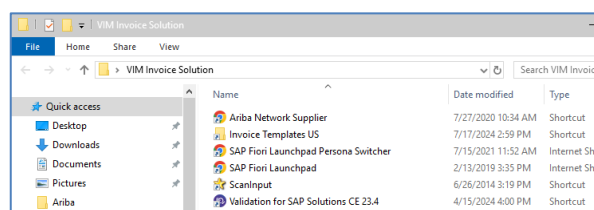
Demo-specific templates, documents, folders, and application shortcuts can be found through several alternative ways on the demo client. These resources are also described in each demo guide.

- Follow the product-specific shortcuts on the desktop to find a collection of shortcuts relevant for demoing a product.

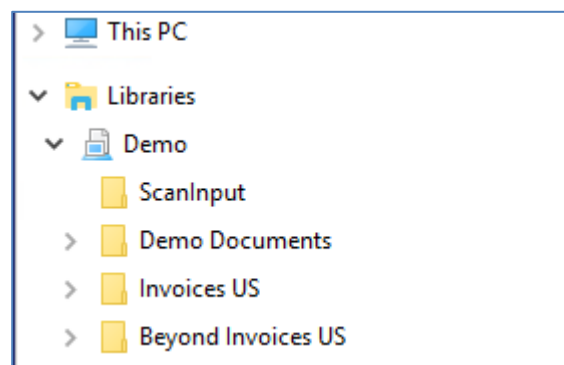
Click a shortcut to start an



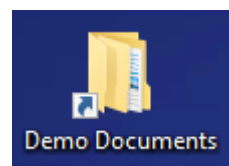
application, or to open a relevant file system location, such as a folder where you need to copy files in order for them to be scanned.



- The *Demo* library contains sample documents and templates, grouped by product.



- The *Demo Documents* folder within the Demo library is also accessible through a shortcut on the desktop.



Setting the demo region for localized resources and other preferences



Some demos require localized documents and settings on the demo client.

For example, there are localized invoice templates for the **Vendor Invoice Management** demo available in the library. These Microsoft Office templates may require that the number and date format of the Windows system match the region the template is for. An US invoice template, for example, may require US date and number formats set through the *Region and Language* settings in Windows.

There is a tool available on the demo client which lets you easily change the respective Windows locale settings with one mouse click. For your convenience, the tool will also change some shortcuts so that you can easily find the localized templates for the chosen region from within the product specific desktop folder.

The default region for all users is set to US. If you would like to use localized templates for some other region, please change the settings through the tool as described below.

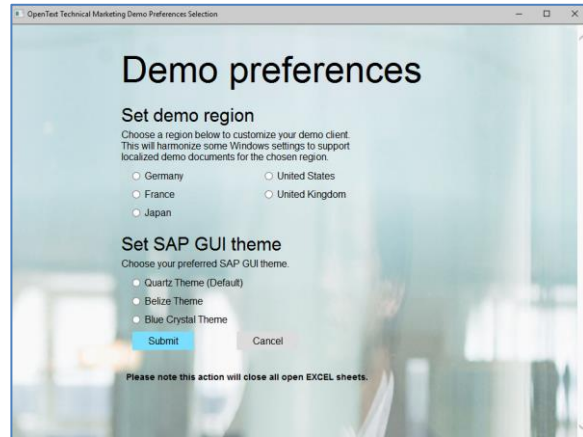
We recommend making this choice at the beginning of each demo session, as it will not be remembered beyond the weekly system reset.

In addition to selecting a region, you can also choose your **preferred theme for SAP GUI**: either keep the default “Belize” (Fiori) or choose “Blue Crystal”. Your SAP GUI theme preference will be remembered until demo client reset (usually on Saturdays). You can change your choice at any time.

1. Click the Set Demo Region shortcut on the Desktop.

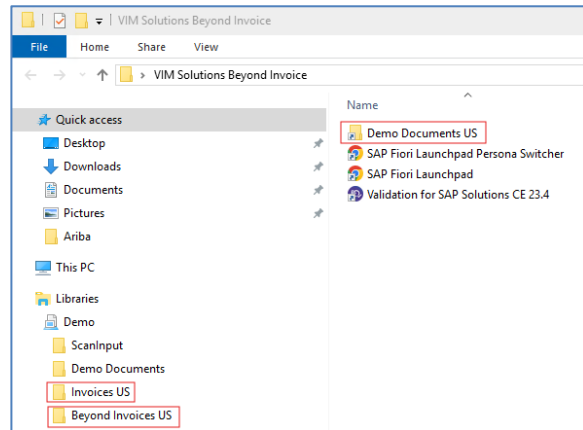


2. Choose the region – and optionally choose your preferred SAP GUI theme – and click **Submit**.



3. The necessary settings for region and language have now changed.

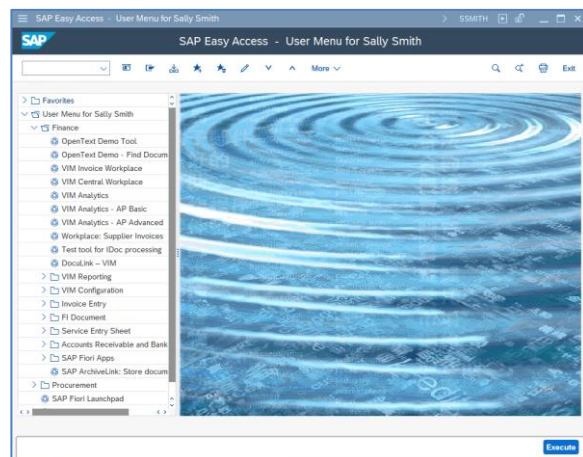
Also, the link within the Vendor Invoice Management folder now points to the corresponding templates for the chosen region.



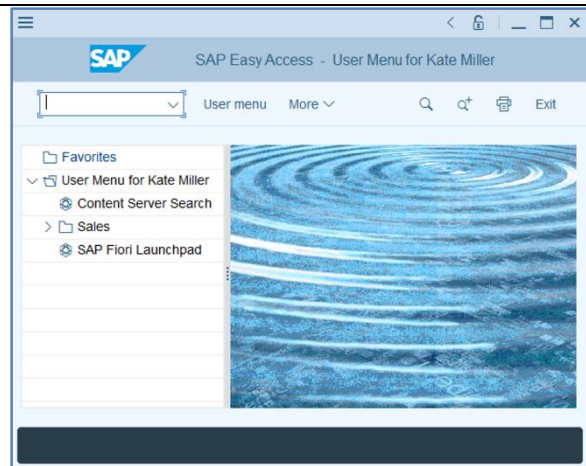
4. Optional: If you chose a SAP GUI theme in step 2, the change will take effect at your next login through "SAP Logon" shortcut on the desktop.



(If you chose "Quartz":)



(If you chose "Belize":)



Creating and storing your own documents

Persistent File Share

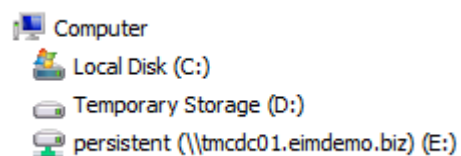


Templates and demo documents on the Terminal Server are read-only because all users are using the same templates and demo documents. The folders where these files reside are also read-only. If you want to modify a document for your demo, you can save the modified file in your personal folder on the persistent file share. The share is persistent and will not be affected by the weekly reset.



Note that the persistent file share is shared with all other users of the demo environment. Do not store any confidential data there. We also recommend to back up your documents regularly in a different place, as others could accidentally edit or delete the data in your folder.

Save files to your personal folder on the persistent file share which is mapped to drive E: on the demo client. Your personal folder is the folder which has the same name as your user name.



If there is no such folder with your login name, simply create one yourself.

Methods to transfer files to/from the demo client:

- If you have a modern operating system and RDP client, you may be able to copy files through the clipboard:
 8. Select the file on the demo

client and press CTRL-C.

9. On you own computer, insert the file from the clipboard, e.g. through CTRL-V on a Windows computer.

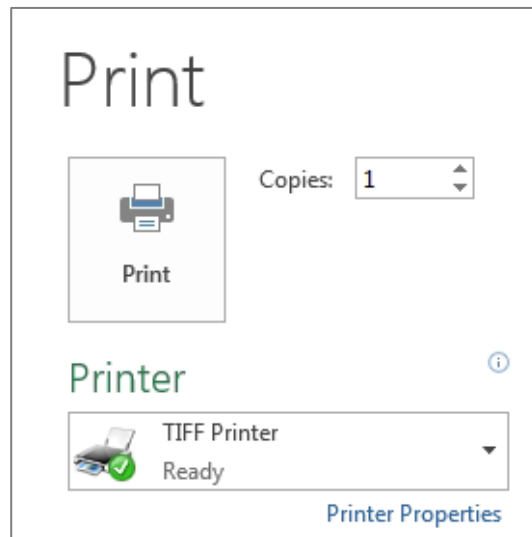
Note: Maximum supported file size for copying through clipboard is 100 MB.

- Or upload the files to a cloud site via the web browser on the demo client.
(Standard http and https ports are supported.)
-

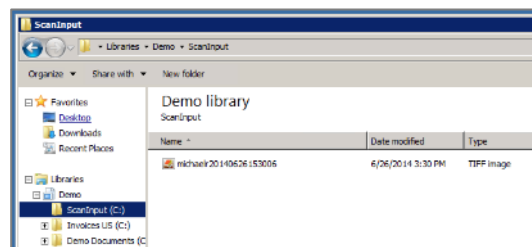
Printing and scanning

Some demo scenarios require you to “emulate” scanning. You do that by first printing a document - such as a Word or Excel document – into a TIFF file, or saving it as a PDF file, and then using the Enterprise Scan client to import the file.

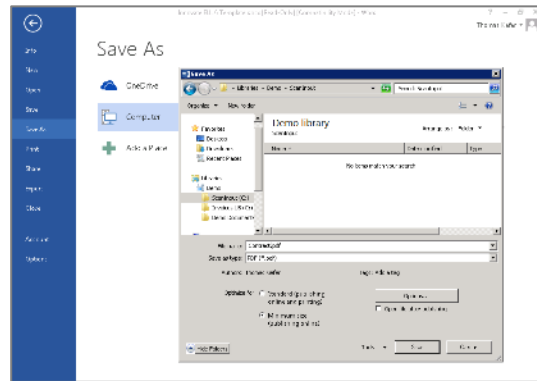
-
1. Select the “TIFF printer” when you need to print a document to a file. The TIFF Printer is already setup as the default printer on the demo client.



-
2. The printer driver will print your document into a TIFF file in your personal scan input folder (Libraries > Demo Scan Input).



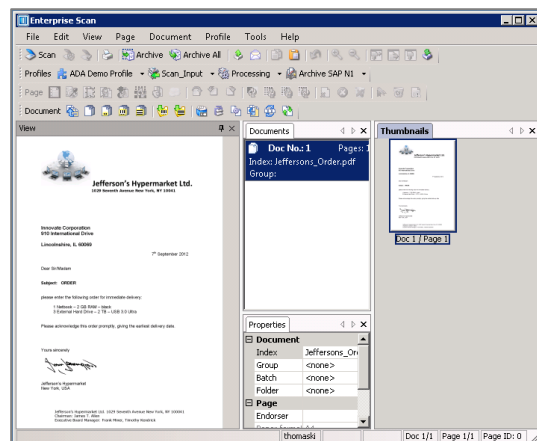
3. As an alternative, you can save any Microsoft Office document as a PDF file. Save it to your personal scan input folder (Libraries > Demo > Scan Input).



4. Now open Enterprise Scan through the desktop shortcut.



5. Select the right scan profile as described in the demo guide for your scenario.
6. Then click the *Scan* button to import the TIFF or PDF file.
7. Proceed with your scenario as described in the demo guide.



Handling E-Mail

Technical Marketing demo scenarios include around 50 personas with corresponding demo users and their mailboxes. You can access the Inboxes relevant for your scenario through Outlook on the demo client..

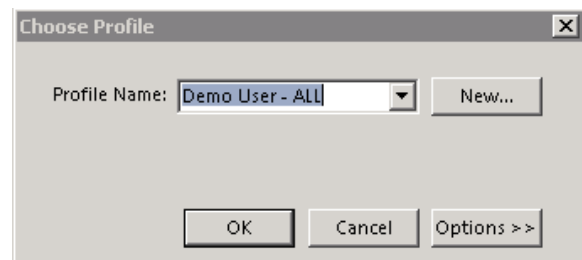
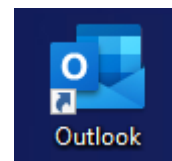
Outlook on demo client

With Outlook on the demo client, you can access all the inboxes relevant for your scenario with a single login.

1. Access the inboxes of all demo personas with a single login:

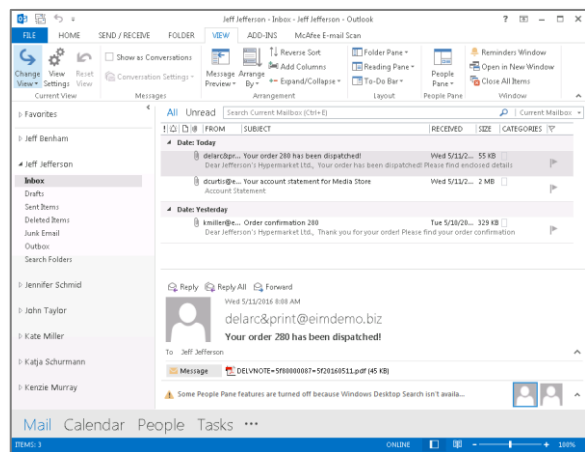
Follow „Outlook 2013“ shortcut on the demo client's desktop and select profile „Demo user – ALL“ to access inboxes for all users.

For your convenience, user name and password are already preset.



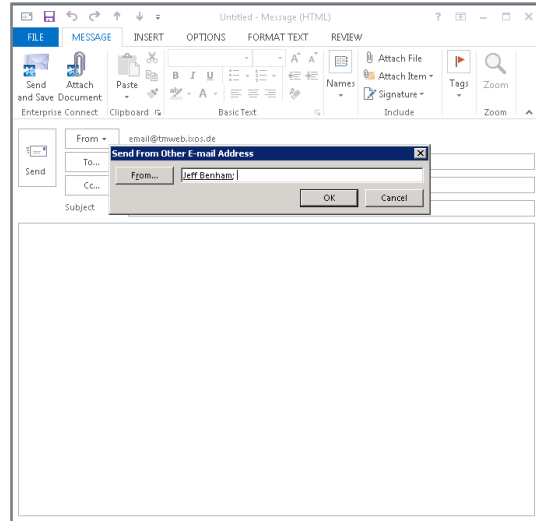
2. Find the mailboxes of the relevant demo users in the folder pane on the left hand side.

You can easily switch between these mailboxes without entering additional credentials. Just click a user name to the left to open the mailbox of the respective user.



-
3. You can send messages from different user accounts without switching the Outlook profile.

Just create a new message, click the *Options* tab on top, click the *From* field, search for and select the appropriate demo user as described in the demo guide.



Ending your demo session

We encourage you to **logoff** your remote session when you are done with your demo or demo preparation. Do not just disconnect – which is the case when you just close the Remote Desktop window.

This will help other users as it will release resources on the system and will help to avoid exceeding the maximum number of remote connections.

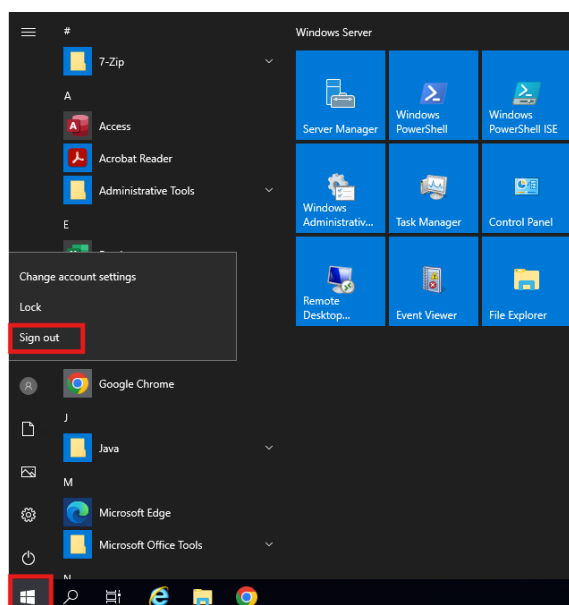
Also, it will avoid any issues when you connect next time, as you will get a fresh session instead of attempting to reconnect to an expired session – which may fail.

Logging off means to end your session, rather than just disconnecting.

Note that you will be logged off automatically after 2 hours of inactivity.

The steps required to logoff are given below.

Click the Windows **Start** button, then click **Logoff**.



Managing your IDEA2 account and password

Password Policy

Our password policy mandates the creation of a 16-character long, complex password. You will need to change this password every 90 days. You will get an email notification from OpenText Technical Marketing Support <no-reply@idea2.eimdemo.com> to remind you to change your password. These will be sent 30 days, 7 days and 1 day before expiry. A reminder will also be shown in the Windows UI within your RDP session 30 days prior password expiry. Please whitelist no-reply@idea2.eimdemo.com in our email application. For example, right-click the email in Outlook, then click "Junk" > "Never Block Sender".

Please make sure to change your password prior expiry as described below in chapter “changing your password”. If your password has expired you can reset it, as described below in chapter “Resetting Your Password”.

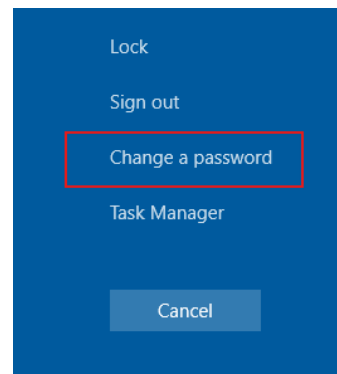
Changing your password


You can change your IDEA2 Online password via Windows, or via the [OpenText IDEA2 User Account Self-Service](#). Please follow the steps below.

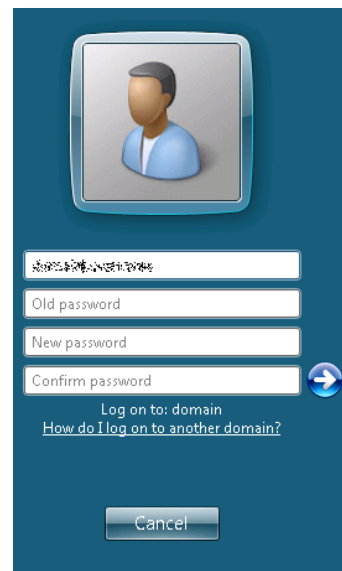
Via Windows

1. While you are connected and signed-in to the demo client, press the 3 keys CTRL + ALT + END at the same time.

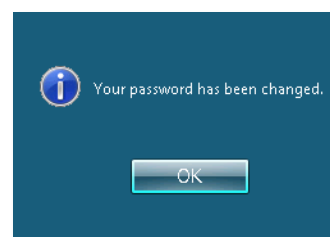
2. Select "Change a password"



3. Enter old password.
4. Enter new password (twice).
5. Click the arrow. 



6. Click OK.

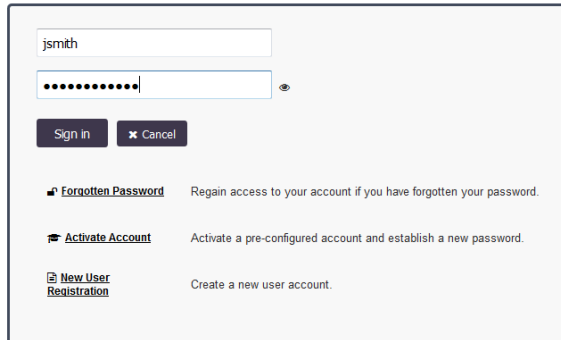


Via User Account Self-Service

1. Login to the OpenText IDEA2 User Account Self-Service homepage:
<https://ideaaccount.eimdemo.com>

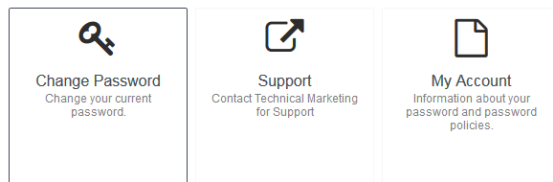
with your existing user name and password.

Or access the following URL directly:



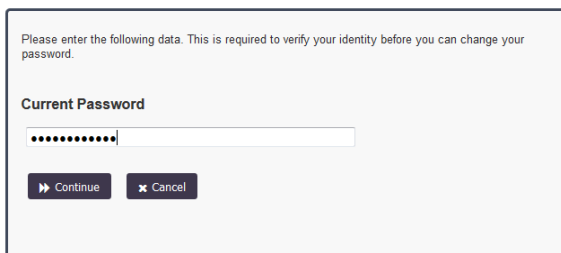
The screenshot shows the login page with a username field containing 'jsmith' and a password field with masked characters. Below the fields are 'Sign in' and 'Cancel' buttons. Further down, there are three links: 'Forgotten Password' (with a key icon), 'Activate Account' (with a mail icon), and 'New User Registration' (with a person icon). Each link has a brief description of its function.

2. Click **Change Password**.



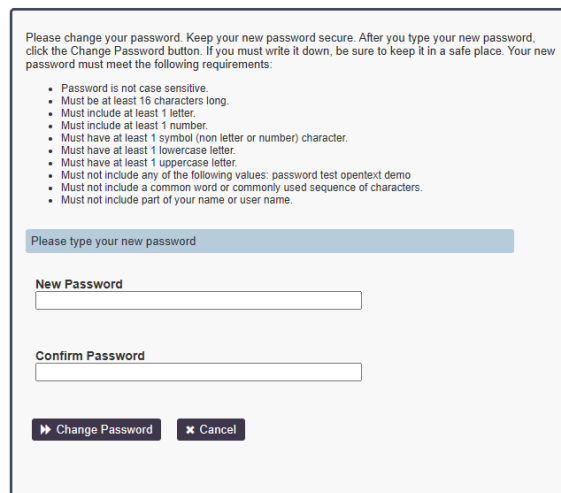
The screenshot shows a dashboard with three main tiles: 'Change Password' (with a key icon and text 'Change your current password'), 'Support' (with a mail icon and text 'Contact Technical Marketing for Support'), and 'My Account' (with a document icon and text 'Information about your password and password policies').

3. Enter your current password



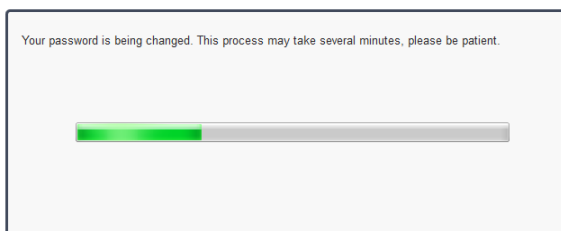
The screenshot shows a form titled 'Current Password' with a text input field containing masked characters. Below the field are 'Continue' and 'Cancel' buttons. Above the field, there is a message: 'Please enter the following data. This is required to verify your identity before you can change your password.'

4. Enter your new password twice and click **Change Password**.



The screenshot shows a form titled 'New Password' with two text input fields: 'New Password' and 'Confirm Password'. Below the fields are 'Change Password' and 'Cancel' buttons. Above the fields, there is a message: 'Please change your password. Keep your new password secure. After you type your new password, click the Change Password button. If you must write it down, be sure to keep it in a safe place. Your new password must meet the following requirements:'. Below the message is a list of requirements: 'Password is not case sensitive', 'Must be at least 16 characters long', 'Must include at least 1 letter', 'Must include at least 1 number', 'Must have at least 1 symbol (non letter or number) character', 'Must have at least 1 lowercase letter', 'Must have at least 1 uppercase letter', 'Must not include any of the following values: password test opentext demo', 'Must not include a common word or commonly used sequence of characters', and 'Must not include part of your name or user name.'

5. Wait until the password is changed.
Click **Continue**.



The screenshot shows a progress bar with a green segment on the left and a grey segment on the right. Above the bar, there is a message: 'Your password is being changed. This process may take several minutes, please be patient.'

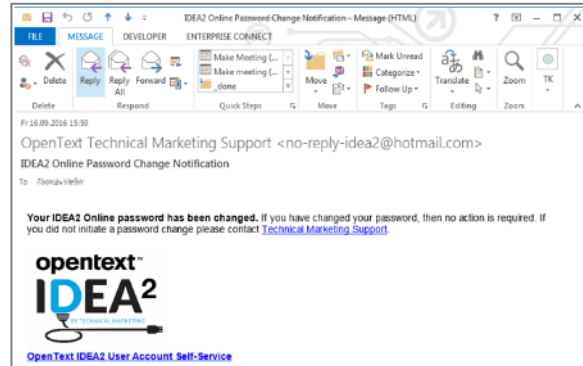
Your password has been changed successfully.

Continue

6. If you have entered a valid email address which is associated with your existing account, you should receive an email a password reset notification.

It will take a few minutes until you get an email from OpenText Technical Marketing Support **no-reply@idea2.eimdemo.com** with subject *IDEA2 Online Password Change Notification*.

If you do not receive the email within 5 minutes in your Inbox, then check your spam folder. If it is there, make sure to whitelist **no-reply@idea2.eimdemo.com**. For example, right-click the email in Outlook, then click "Junk" > "Never Block Sender".



Resetting your Password

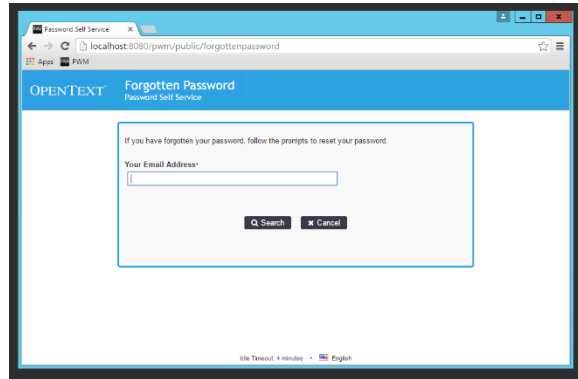
You can reset your IDEA2 Online password via the [OpenText IDEA2 User Account Self-Service](#). Please follow the steps below.

1. From the OpenText IDEA2 User Account Self-Service homepage, click **forgotten password**.

Or access the following URL directly:
<https://ideaaccount.eimdemo.com/pwm/public/forgottenpassword>

A screenshot of the OpenText IDEA2 User Account Self-Service login page. It features a "Username" input field and a "Password" input field. Below these fields are "Sign In" and "Cancel" buttons. Underneath the buttons are three links: "Forgotten Password" (with a key icon), "Activate Account" (with a checkmark icon), and "New User Registration" (with a person icon). Each link has a brief description: "Regain access to your account if you have forgotten your password.", "Activate a pre-configured account and establish a new password.", and "Create a new user account." respectively.

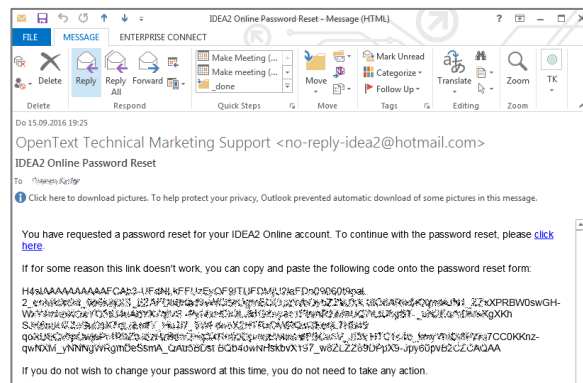
2. Enter your email address and click **Search**.



3. If you have entered a valid email address which is associated with your existing account, you should receive an email with reset instructions.

Wait a few minutes until you get the verification email from OpenText Technical Marketing Support <**no-reply@idea2.eimdemo.com**> with subject **IDEA2 Password Reset**.

If you do not receive the email within 5 minutes in your Inbox, then check your spam folder. If it is there, make sure to whitelist **no-reply@idea2.eimdemo.com**. For example, right-click the email in Outlook, then click "Junk" > "Never Block Sender".



4. To complete the registration, follow the instructions in the email:
 1. Either click the **click here** link in the email.
 - a. Or copy and paste the code from the email to the **Code** field in the form and click **Check Code**.

To verify your identity, a security code has been sent to you. Please click the link in the email or copy and paste the security code here.

Code

Enter a new password

Dealing with the weekly reset



IDEA2 Online is unavailable during the weekly maintenance window:

**Each Saturday
from 6 a.m. until 12 p.m. Central European Time (CET)**

During maintenance, all servers and the demo client may be reset to a “wanted” clean state. Also, updates – such as new scenarios, improvements and patches - will typically be released during this time frame.

The weekly reset impacts you in multiple regards:

- You cannot run demos or prepare for demos during the maintenance time frame.
- Any data that you prepare on the demo client or in any of the applications may be lost after the weekly reset. This includes all kinds of data and content, such as SAP records, archived data, documents, emails, desktop shortcuts, browser favorites and so on.
- If you have a customer presentation taking place *after* the next weekly maintenance time frame, then prepare the data only after the maintenance.
- Application passwords may be reset to the values mentioned in the demo guides.
- Your personal EIMDEMO demo system user account will **not** be reset during maintenance.
- Demo scenarios may change, and new scenarios may be added. Please subscribe to relevant News feeds in order to receive updates – see ➔ IDEA Online News (page 41).

Additional demo options

Technical Marketing provides additional systems and materials for demonstrating OpenText Content Services products and solutions. Find an overview of all options, and details below.

IDEA2 Playback - Screen cam recordings

We do offer screen cam recordings for many of the demo scenarios which are available in IDEA2 Online. You may want to download and play these videos in front of prospects or customers - in situations where you cannot run a live demo.

The videos come without any audio track, allowing you to tell a tailored story on your own, but pop-up text boxes describe user actions and highlight key product features.

The videos are available in My Support:

[OpenText My Support - All IDEA Demo Resources By Product](#)

(Drill down to the specific product and version to find the videos in the **ScreenCam's** subfolder.)

Click-Tours / Guided Tours

Click-tours are a safe and engaging way to learn about OpenText products and solutions, without the complexity and infrastructure requirements of a full-scale demo. Each tour is designed to simulate a 'live' application using interactive screenshots to guide you step-by-step through a product demonstration, in exactly the same way you would work with the actual software.

Some of the products and solutions included in IDEA2 are available as a click-tour / Guided Tour.

See the complete list of available click-tours in TestDrive:

[About Click-Tours](#)

Hands-On Labs

Hands-On Labs are not demos but will enable you to engage in an interactive learning experience with a chosen OpenText product, including some of those available in IDEA2.

Labs are self-paced, so you can learn when it suits your schedule and most exercises can be completed in under an hour.

They are a great way to get your hands on an unfamiliar product, to kickstart your onboarding as a new employee or to learn about the latest new product features before you host any customer demos.

Further information in TestDrive:

- [About Hands-On-Labs](#)

Comparison of IDEA demo options

Demo Option	Features	Requirements and Limitations
IDEA2 Online Online environment for Content Services hosted by OpenText Technical Marketing.	<ul style="list-style-type: none"> • Wide range of hosted demo scenarios • Features <i>Content Services</i> Products • Frequent updates with new scenarios and features • Fully supported by Technical Marketing Helpdesk 	<ul style="list-style-type: none"> • High-Speed Internet Connection • EIMDEMO domain user account • Access may be blocked or limited on customer site • Cannot use for proof of concept or development projects • Weekly reset removes custom settings, data and documents
IDEA2 Playback Screen cam recordings of demo scenarios	<ul style="list-style-type: none"> • Wide range of recorded demo scenarios • Features <i>Content Services</i> Products • Not impacted by network limitations as you play the videos on your notebook 	<ul style="list-style-type: none"> • Standard hard- and software to play MP4 videos
Click-Tours /Guided Tours Simulated demos	<ul style="list-style-type: none"> • Wide range of demo scenarios. Simulates a 'live' application. • Features <i>Content Services</i> products and more • Occasionally updated based on IDEA2 Online environment updates • Not impacted by network limitations as you run the tour on your notebook 	<ul style="list-style-type: none"> • Runs in a web browser
Hands-On Labs	<ul style="list-style-type: none"> • Interactive, self-paced learning experience that enables you to advance your knowledge of OpenText products. • Features <i>Content Services</i> products and more 	<ul style="list-style-type: none"> • Follow the step-by-step instructions in the workbook. • Most labs for Ecosystem products will launch a Click-Tour, so it will run in your web browser.

Finding resources and staying informed

Demonstration resources in My Support

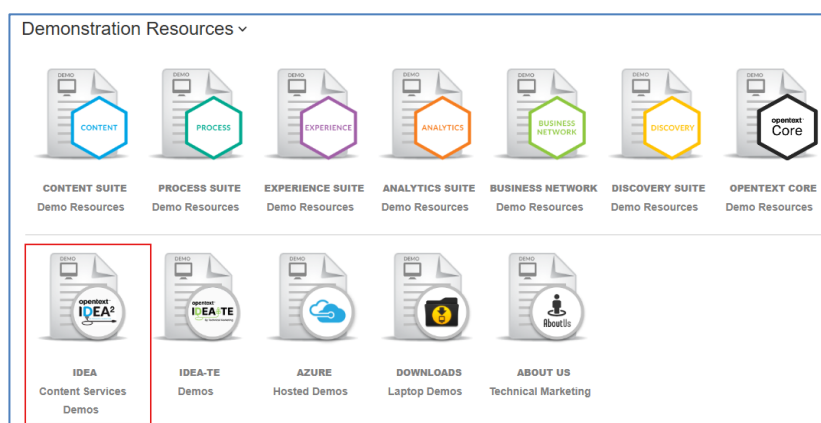


You can find all demo-related resources in the “Demonstration” workspace in My Support. This is your key resource about everything demo related at OpenText.

Login to My Support, then drill down to Product > Product Information > Demo Resources.

Or access the page directly through

<https://knowledge.opentext.com/go/demonstration>



IDEA2 Resources:

All IDEA2 documentation - including demo guides - is located here:

[IDEA2 Online - Demo Resources](https://knowledge.opentext.com/go/IDEA2DOCU)

(<https://knowledge.opentext.com/go/IDEA2DOCU>)

The above folder is located here in My Support:

Product > Product Information > Demo Resources > IDEA - Content Services > IDEA2 Documentation

Known Issues in IDEA2

Please check for current issues and system health here:

[Known Issues IDEA2](https://tm-support.opentext.com/issues/)

(<https://tm-support.opentext.com/issues/>)

- You can search that web page for keywords and filter by product.
- The list is always up-to-date and reflects all relevant identified issues which could impact your demos. It gets updated every 30 minutes from our internal issue tracking and project management system.
- A shortcut pointing there is available on the IDEA2 demo client's desktop in the "Support" folder.
- If you would like to report additional issues which are not covered there yet, please raise a demo support ticket via <https://tm-support.opentext.com/support/>.

Inventory of all IDEA2 demo use cases

All the use cases described in IDEA2 demo guides are reflected in this overview spreadsheet:

[IDEA - Inventory - Consolidated](#)

(https://knowledge.opentext.com/go/EA_IDEA2_IV)

You can filter the inventory by Status, Demo Platform, Business Area, Products, Demo Guide and other criteria.

The demo guides mentioned in the spreadsheet are available in the above-mentioned documentation folder.

Current Status	Demo Platform	Roadmap	Roadmap Plan Date	Functional Business Area	Demo Guide	Use Case or demo path title
Available	IDEA2			Finance & Accounting	IDEA2 - Core Capture for SAP - Machine Learning - Demo Guide	SAP Fiori Machine Learning Demo: Use case 1: Machine Learning for Invoices
Available	IDEA2			Sales & Distribution	IDEA2 - Core Capture for SAP - Machine Learning - Demo Guide	SAP Fiori Machine Learning Demo: Use case 1: Machine Learning for Sales Orders
Available	IDEA2			Finance & Accounting	IDEA2 - Core Capture for SAP - Reporting and Analytics - Demo Guide	Capture Analytics SAP Fiori Apps - for all solutions
Available	IDEA2			Finance & Accounting	IDEA2 - Core Capture for SAP - Reporting and Analytics - Demo Guide	Capture Dashboard and Extraction Reports in VIM Central Workplace in SAP GUI for all solutions
Available	IDEA2			Marketing	IDEA2 - Digital Asset Management CE - SAP eCommerce - Demo Guide	Use Case 1N: Publish digital assets manually to SAP Commerce Cloud.
Available	IDEA2			Marketing	IDEA2 - Digital Asset Management CE - SAP eCommerce - Demo Guide	Use Case 2N: Publish digital assets automatically to SAP Commerce Cloud.

Current Status	Demo Platform	Roadmap	Roadmap Plan Date	Product	Material (Demo Guides, Manuals, etc.)	TM DEMO ID	Version	Last Modified
Available	IDEA2			Core Capture for SAP Solutions	IDEA2 - Core Capture for SAP - Machine Learning - Demo Guide	EA_IC_ML	6.1	15.10.2024
Available	IDEA2			Core Capture for SAP Solutions	IDEA2 - Core Capture for SAP - Reporting and Analytics - Demo Guide	EA_IC_REP	1.1	15.10.2024
Available	IDEA2			Digital Asset Management	IDEA2 - Digital Asset Management CE - SAP eCommerce - Demo Guide	EA_DAM_MAIN	3.1	15.10.2024
Available	IDEA2			Document Access	IDEA2 - Document Access for SAP - Component DocuLink - Demo Guide	EA_ADA_DC	2.1	15.10.2024
Available	IDEA2			Document Access	IDEA2 - Document Access for SAP - Data Archiving - Demo Guide	EA_ADA_DA	2.1	15.10.2024
Available	IDEA2			Extended ECM Documentum for SAP	IDEA2 - Extended ECM Documentum for SAP CE - Enterprise Asset Management - Demo Guide	EA_EECM_D2_SAM	2.2	15.10.2024
Available	IDEA2			Extended ECM Documentum for SAP	IDEA2 - Extended ECM Documentum for SAP CE - Procurement - Demo Guide	EA_EECM_D2	1.3	15.10.2024
Available	IDEA2			VIM Invoice Solution	IDEA2 - Vendor Invoice Management - Arriba Integration - Demo Guide	EA_VIM_ARI	6.1	16.10.2024
Available	IDEA2			VIM Invoice Solution	IDEA2 - Vendor Invoice Management - e-Invoicing - Demo Guide	EA_VIM_ERV	6.2	16.10.2024
Available	IDEA2			VIM Invoice Solution	IDEA2 - Vendor Invoice Management - Handling Accountant - Demo Guide	EA_VIM_EHN	6.1	16.10.2024
Available	IDEA2			VIM Invoice Solution	IDEA2 - Vendor Invoice Management - Input Scenario - Demo Guide	EA_VIM_INP	6.1	16.10.2024
Available	IDEA2			VIM Invoice Solution	IDEA2 - Vendor Invoice Management - Non-PO Invoice Processing - Demo Guide	EA_VIM_NPO	6.2	16.10.2024
Available	IDEA2			VIM Invoice Solution	IDEA2 - Vendor Invoice Management - Overview and Preparation - Demo Guide	EA_VIM_MAIN	6.2	16.10.2024
Available	IDEA2			VIM Invoice Solution	IDEA2 - Vendor Invoice Management - PO Invoice Processing - Demo Guide	EA_VIM_PO	6.1	16.10.2024
Available	IDEA2			VIM Invoice Solution	IDEA2 - Vendor Invoice Management - Processing Invoices end-to-end in SAP Fiori - Demo Guide	EA_VIM_FIORI	2.2	16.10.2024
Available	IDEA2			VIM Solutions Beyond Invoice	IDEA2 - Vendor Invoice Management - Delivery Note - Demo Guide	EA_BC_DN	6.1	15.10.2024
Available	IDEA2			VIM Solutions Beyond Invoice	IDEA2 - Vendor Invoice Management - Order Confirmation - Demo Guide	EA_BC_OC	6.1	15.10.2024
Available	IDEA2			VIM Solutions Beyond Invoice	IDEA2 - Vendor Invoice Management - Return/Advance - Demo Guide	EA_BC_RA	6.1	15.10.2024
Available	IDEA2			VIM Solutions Beyond Invoice	IDEA2 - Vendor Invoice Management - Sales Order - Demo Guide	EA_BC_SO	6.1	15.10.2024

IDEA Online News

Technical Marketing informs active, registered demo users via email whenever there are important news. When we release new demos, we will send you links to corresponding material, such as the demo guide, plus information about release dates and enabling sessions. Please read this information carefully if it is relevant for you.

News sent via email include:

- releases and changes)
- new demo releases
- updates to demo scenarios
- changes in the demo environment
- alerts about issues and planned outages

We will also post this information here:

[IDEA Online NEWS](#)

(<https://knowledge.opentext.com/go/IDEANEWS>)

The above folder is located here in My Support:

Product > Product Information > Demo Resources > IDEA – Content Services Applications > IDEA Online NEWS

Getting support

IDEA2 Online and additional demo resources are operated and supported by OpenText Technical Marketing.

- We currently provide support **from Monday till Friday at European business hours.**
- We strive to support you as soon as we can. However, note that we cannot guarantee to resolve issues “last minute” before customer presentations. We recommend to prepare and test the demo in good time before the customer joins. If you do a demo for the first time, or if the demo is complex and critical, prepare and test a couple of days ahead.
- We can only support demo scenarios which have been officially released by Technical Marketing.
- We cannot support any scenario, use case, feature or configuration, other than those described in the released demo guides.
- In some cases, Technical Marketing may not be able to fix an issue right away. We may need to involve the responsible product managers and developers for prioritization, scheduling and release of fixes or improvements.

Via Email (Partners only)

As a partner, simply contact us via email if you need help with our demo environment(s) or resources, or if you have questions or suggestions:

- **To open a support ticket:**
Send an email to: tm-support@opentext.com
- **To request a demo feature:**
Click here to send an email: [Feature Request](#)
(The link will create a new email in your email client - with a predefined subject line and body text. That helps us to automatically route your request.)

You will receive an auto-response with a ticket ID from our Helpdesk application. If you don't, please check your spam folder.

Your email won't be received by our helpdesk if it is larger than 10MB. In that case, the mail server will send you a respective non-delivery notification. Please remove large images and attachments and resend your email. Support staff will provide alternative ways to share large files, if required.

First-time senders will also receive a welcome email with a user name and password for the helpdesk's web user interface.

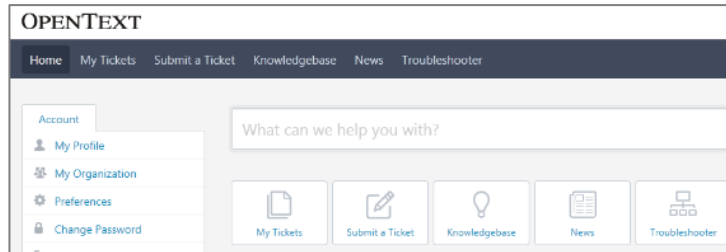
Via helpdesk web user interface (Partners only)

As a partner, you can also create, view, or update tickets via the Helpdesk's web interface through <https://tm-support.opentext.com>.

- Click *Submit a Ticket* – to open a ticket.

A user account is not required for creating tickets, but you will need to register in order to view or update your own tickets.

If you choose to register, you will receive an automated welcome message. Make sure to click the contained verification link to confirm your email address.



Via One Demo Service Portal (OpenText Staff only)

OpenText staff please submit your tickets through the One Demo Service Portal via TestDrive. For further details, please check this page in TestDrive:

- <https://td3.eimdemo.com/p/about-onedemo-service-portal>

Note for partners: Please continue using the current portal (tm-support.opentext.com) for now. We are in the process of making the One Demo Service Portal available to you in the near future.

Help us to help you better

Depending on your concern, Technical Marketing may ask for detailed information in order to resolve it. You can speed-up the process if you provide the following information up-front when contacting us.

In case of demo issues or questions

If a demo does not work as described by Technical Marketing, or if you have any questions, provide the following information:

- **Date, time, country/office** - when the issue occurred and where
- **Demo type** – Online Environment, Skytap, downloaded VM image, Screen Cam Recording
- **User name** – your user name in TMWEB domain, OPENTEXT domain or other involved system.
- **Resource** – Name/link of script, story board, image, video etc.
- **Detailed description of issue** - including detailed steps to reproduce it, namely the involved login names, data and documents. Send screenshots if possible.
- **Prioritization/urgency** – from your point of view.

In case of suggestions

Feel free to send us suggestions for improvement or request additional demo scenarios or use cases. We are happy to forward requests to the product manager who is responsible for the demo portfolio of the corresponding product. Please provide:

- **Feature** – title for suggested feature, scenario or use case, or change
- **Product/Solution** – name of product or solution, and/or title of existing scenario
- **Description** – details for suggested feature, scenario or use case, or change
- **More information** – e.g. contact information and links to additional information

Click here to send an email with body text predefined accordingly:
[Feature Request](#)

In case you forgot your password

All users can reset their passwords via the [OpenText IDEA2 User Account Self-Service](#) at <https://ideaaccount.eimdemo.com> .

See ➔ [Resetting your Password](#) (page 31).

In case you are an OpenText employee and need an IDEA2 account

OpenText staff can self-register for an IDEA2 Online account through the [OpenText IDEA2 User Account Self-Service](#) at <https://ideaaccount.eimdemo.com> .

See ➔ [OpenText Staff](#) (page 7).

About Technical Marketing

Technical Marketing is a small team of product marketing specialists who are responsible for creating, hosting and distributing sales enablement tools to Open Text's direct and indirect sales force.

We build the demo systems that are used by solutions consultants and partners to showcase our products and solutions.

Contact Us

Simply send us an email if you need help with our demo environment(s) or resources:

tm-support@opentext.com

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To request a demo feature:

Click here to send an email: [Feature Request](#)