

## ReporterBase Support and Software Maintenance Plans

OMTI offers three different plans for supporting and maintaining your RB office:

- **Standard** — Regular RB support plan includes unlimited phone, live chat, email, fax, and remote support\* during our regular office hours. Included free in RB subscriptions, both RB8 Subscribe and RB8 Cloud.\*\* Includes some fee-based services. Can be upgraded to Premium for an additional monthly fee.
- **Premium** — Full-featured support plan includes RB8 Server re-installation & database moving and faster response time. Available for a monthly fee, plus a per-incident fee for extended service hours.\*\*
- **Public** — A limited plan only available to clients who bought RB prior to January 1, 2002. It provides support on a per-incident fee basis. Can be upgraded to Standard or Premium for an annual fee.\*\*

### General support plan information

As our clients' need change and new support technologies become available, we periodically revise existing plan benefits and add new ones. For the latest benefits listing, visit the RB Support section of our website, [www.omti.com/rb](http://www.omti.com/rb).

Most support services are only available during our regular office hours: 9 am–7pm CT, M–F, excluding holidays. Support information and news are available 24x7 on our website. Premium clients can schedule certain support services, such as program update installations, during our extended service hours for an additional fee. Extended service hours are 7–10 pm CT, M–F, and 12–8 pm CT, Saturdays, excluding holidays.

All firms using RB software are required to be on a support plan. Standard support is included in RB8 Subscribe and RB8 Cloud subscriptions. Optional RB Premium support contracts are an additional monthly fee.

You can change plans at any time. If you upgrade to Premium support, changes in services do not occur until the first monthly payment is received. To change your support plan, contact [RB Sales](#).

If you should fall into arrears on any support plan payment, OMTI will suspend your RB support. RB8 Subscribe users and RB purchase clients will also no longer be able to get program updates. If you should call us for support while in arrears, we will ask for a credit card number to charge the per-incident fee before providing the requested support. If you wish to renew your support plan at a later date you will be billed for a minimum of one month's support plus for the unsupported time as well. RB8 Cloud subscribers who fall into arrears will be unable to access their RB8 system until they pay any past due balances and set up automatic payments per our RB8 Cloud Service Agreement.

**Support policies do not include:** Training, beyond three (3) initial one-to-one remote sessions covering set-up and basics, plus what is provided online; hardware or third-party software maintenance and support; disaster recovery; support for your network or Internet access; off-business-hour support, except for Premium users (fee-based, by appointment only); or custom programming. We do offer custom reports starting at a base rate of \$2,000 per report, plus you must be on Premium Support and pay an extra 15% annually of the total billed amount for any custom programming.

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\* Remote access requires a browser that allows ActiveX Controls to be installed by RB Support.

\*\* For client who purchased RB (not subscription clients), Standard support costs \$850/year paid annually in advance. Can be upgraded to Premium for an additional annual fee of \$1,500/year paid annually in advance. RB is no longer available for purchase, but is subscription based only.

## Support plan benefits

	Public	Standard	Premium
Online support	O	O	O
Initial product installation	X	\$250 + optional data conversion	
Telephone, fax, email, & remote support*	\$250/incident	O	O
Live chat support	X	O	O
Scheduled call-backs	X	O	O
Update releases	\$500/incident	O	O
Upgrade releases	X	O (in subscriptions, requires data conversion for extra fee)	
Server re-installation & database moving service	\$500/incident	\$250/incident	O
RB XChange Job Exchange listing		optional	optional
Guaranteed response	X	w/i 24 bus. hrs.	w/i 4 bus. hrs.
Extended service hours	X	X	fee-based
Custom programming	X	X	fee-based

O = included X = not included

## Service descriptions

### Initial product installation

To ensure that your RB software is installed correctly, RB Support does the initial installation during our regular office hours. We will consult with your staff and/or third-party technicians to coordinate your set-up with your work environment and schedule.

Due to the complex nature of RB's internal structure, we do not allow clients or third parties to install RB Server themselves. You are allowed to perform your own workstation installation, but installation by RB Support is included in both Standard and Premium support plans.

### Online support

Users can find answers to their ReporterBase questions in several areas online:

The OMTI KnowledgeBase contains information on product releases, answers to frequently asked questions (FAQs) and step-by-step solutions to common operational and software problems. It is available through our customer portal ([support.omti.com/customerportal/](http://support.omti.com/customerportal/)). You can search for articles in this online database by keyword, product, most viewed or most recently posted. The KnowledgeBase covers all areas of currently-supported OMTI products, such as the Calendar and Billing modules in RB8.

Training videos and downloadable user guides are available in the Team RB section of our website: [www.omti.com/rb](http://www.omti.com/rb).

Step-by-step instructions and more product information are available in the Idea Salad archives: [omtiblog.com/ideasalad/](http://omtiblog.com/ideasalad/).

Included in all levels of support.

### Telephone, live chat, fax, email & remote support

Our support staff is available during our regular office hours to provide support in several ways. If you can't find the answer you need in online support, call RB Support or connect with them via live chat on our website for a direct answer.

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Sometimes, it's easier to solve a problem by accessing your computer remotely. In those cases, RB Support will ask you to turn on OMTI Remote so they can view and control your computer while talking you through the solution.\*

In addition to phone calls, you can also communicate with RB Support via email, support@omti.com, or fax, 650-560-6550.

Included in Standard and Premium support. Public users of RB can access telephone, fax, email and remote support for \$250 per incident.

### **Scheduled call-backs**

You can make an appointment with OMTI Support for a time during support hours that is convenient to you for one of our support technicians to call you back to help resolve an RB issue or learn how to use RB better.

### **Guaranteed response**

If you call and leave a message, send an email or fax, RB's guaranteed response time is 24 hours for Standard support clients and four hours for Premium clients, during our regular office hours.

### **Update releases**

Updates are versions of ReporterBase that add new features, fix bugs, and improve usability or performance. They are included free in software maintenance contracts and are designated by the current version number and a serial decimal number (i.e., ReporterBase 8, version 8.7145).

Available in Standard and Premium support plans. Premium users who do not want to disrupt their work day can also schedule installations after our regular office hours for an additional fee. (See Extended Service Hours.) RB8 Cloud installations are automatically updated. Public users of RB can add updates to their system for \$500 per incident.

### **Upgrade releases**

Upgrades are major releases of ReporterBase and are designated by a new version number (i.e., ReporterBase 9). Upgrades are included free in subscription software maintenance contracts, but an upgrade service fee of \$250 for converting data will be charged and payment due in full when invoiced.

Available in RB subscription Standard and Premium support plans. Premium users who do not want to disrupt their work day can also schedule installations after our regular office hours for an additional fee. (See Extended Service Hours.) Upgrade releases are not included in support plans for purchased versions of RB or for Public users of RB.

### **RB Server re-installation & database moving services**

If your server crashes, you upgrade your hardware or you decide to move your RB Server to another system, you will need to have it re-installed. If you ever have a problem with your RB database, you will need to restore it from an earlier back-up. And if you want to transfer your RB database to another computer in your system, you will need to have it moved and re-attached.

RB Server re-installation, database restoration and database moving services by RB Support during regular service hours is included in Premium support. Other RB clients can schedule re-installations during our regular office hours for a fee of \$250/incident if they are on Standard support or \$500/incident if they are not on support.

Premium users who do not want their work day disrupted can also schedule re-installations after our regular office hours for an additional fee. (See Extended Service Hours.)

RB Server re-installation and database moving services do not apply to RB8 Cloud subscribers since we maintain their servers for them in the cloud.

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## **RB XChange Job Exchange listing**

RB8 software include a feature that allows the import and export of job information. This job information file can be emailed as an attachment between RB users who are referring jobs to each other so they do not have to re-key their RB information to enter the job into their system.

To make it easier for eligible RB users to find each other across the country and beyond, we maintain a free job exchange list containing each member's location and contact information in the customer portal.

Included as an option in Standard and Premium support. Eligible support plan clients who wish to participate must fill out and submit an application form (available through our customer portal), which specifically grants us the right to post their contact information in the RB XChange Job Exchange Group.

## **Priority call-back**

Premium clients who contact RB Support via voice mail, email, or fax are guaranteed a response from RB Support within four hours during our regular office hours.

Included in Premium support.

## **Extended service hours**

For Premium clients who don't want to interrupt business during the day for necessities such as installing updates or upgrading their systems, RB Support is available by appointment after our regular business hours. RB extended service hours are 7–10 pm CT, M–F, and 12–8 pm CT, Saturdays, excluding holidays.

Fee-based option in Premium support. Costs \$250 for the first hour, then \$125/hour after the first hour per appointment/resolution.

Not available in Standard support.

## **Custom programming**

If your business processes require something, such as a report or form, that is not in RB8, we can develop a customized solution for you.

Fee-based option in Premium support. Costs a minimum of \$2,000. Requires a Premium support contract and on-going payment of 15% annually of total billed amount for custom programming to maintain custom code.

Not available in Standard support.

## **For more information**

If you would like more information about our products or services, please visit [www.omti.com](http://www.omti.com) or contact OMTI via:

**email:** [info4@omti.com](mailto:info4@omti.com)

**phone:** 650-396-2105

**fax:** 650-560-6550

**mail:** 851 California Drive, Burlingame, CA 94010

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*\*Remote access requires a browser that allows ActiveX Controls to be installed by RB Support.*