



# Create custom reports with your RB data

## Use your RB data with:

Microsoft Access

Crystal Reports

IBM Cognos Analytics

Qlik Sense

Sisense

Tableau

and more

## Add the Data Reader plug-in to your RB9 office and free your data to use outside RB9

If you are on RB9, you cannot create custom reports in other applications using your RB data without the **Data Reader** plug-in. This is due to security issues with directly connecting to RB databases in the cloud. Data Reader solves that problem with a dedicated connection to your RB database in the cloud so you can use your RB information in your own reports or other applications.

## DIY reports in 3rd-party applications

If you want to view your RB data in a way that is not already available in RB9, such as a marketing or financial report that is not part of RB9, add Data Reader to give yourself remote access to your data.

With Data Reader, you log into your RB database in the cloud from a third-party application, such as *Crystal Reports* or *Microsoft Access*, to run your own queries and write custom reports with your RB data.

You do not have to install anything on your end to use Data Reader. And like all RB plug-ins, you subscribe to it on a monthly basis and can cancel it at any time.

## Secure access

Data Reader is a secure way to access your RB database from outside RB9 because:

1. Data Reader is read-only data, meaning you cannot write to your RB database from your outside applications or create any objects in SQL Server.
2. Only workstations/IP addresses (depending on which Data Reader version you have) that you register with OMTI can access your database.

Optional plug-in for



Reporterbase  
Business  
Management  
Systems



## Custom reports from your RB data

### Plug-in options

Data Reader comes in two sizes:

#### Per Workstation

Version for creating custom reports on individual workstations. Good for companies who write reports on up to 3 workstations.

Works for only the named workstation(s) you register with OMTI. A license cannot be shared, so if you want to write reports on a desktop computer and your laptop, you will need 2 licenses.

#### Per IP

Version for companies that need to have four or more workstations access their database outside RB9.

Allows all workstations in an office to access your RB data. If you want to create custom reports on 4 or more workstations, Data Reader – Per IP will be cheaper.

### Pricing & limitations

#### Per WorkStation

**\$60/mo**

The named workstation can access your database.

#### Per IP

**\$200/mo**

The named public IP can access your database.

*NOTE: Sensitive information, such as Tax ID and Social Security numbers, are encrypted and will not be usable data outside RB9.*

### New workstation?

If you ever want to switch your Data Reader registration to a different workstation or public IP, ask us and we can process your request within one business day.

### Which version is right for you?

Most companies will probably need Data Reader on only one workstation to generate reports that can then be emailed to everyone who needs to read the report.

If you do require multiple workstations to access your RB data through Data Reader, there are no bandwidth limitations per any plug-in, so there will be no performance issues in relation to how many concurrent connections you make.

### Requirements for ordering

Depending on which version you want, you must have two things ready before ordering RB9's Data Reader:

- **Workstation name** (Per Workstation account) or **public IP address** (Per IP account)
- **Password for SQL Account:**
  - Must be 8 or more characters and numbers.
  - Must contain one or more alphabet characters (upper and lower case), numbers, and special characters.

For more details, contact:



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*ReporterBase software and services, which includes RB9 business management software for legal support firms, RB Connect online offices, and RB Connect Mobile, are developed and produced by OMTI, Inc., a privately held corporation. For more information, visit omti.com.*