

Integrated Service Agreement
SUPPORT

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1. Introduction

Technical troubles cause headaches and can inhibit production performance. Whether it is to resolve production issues quickly, improve training, or streamline software updates, purchasing an Integrated Service Agreement can provide the knowledge and support needed to address top challenges.

1.1. About Integrated Service Agreements

This flexible suite of support services enables you to maximize the value of your Rockwell Automation investments across your facility. The three-tiered model allows you to select the right package of offerings to meet your needs. Get foundational services with the Essential tier, a full set of support services with Enhanced, or get data insights and proactive management with the Premier tier.

1.2. Why choose Rockwell Automation Integrated Services?

Tailored services can address your unique needs, anytime and anywhere. Whatever your challenge, we have a service or combination of services that can be tailored to your exact needs. Our **3,400 engineers and project managers** have an **average of 13 years of experience**, with deep domain expertise across industries. We work with customers in more than **80 countries** to help them **minimize risk, improve productivity, and more**. You can rely on us for:

- Our global network of factory-trained field service professionals
- ISO-certified repair centers
- IACET-recognized training centers
- Certified technical phone-support centers and online tools

2. Overview of Support Levels

With just **one number to call** and **one customer agreement**, you can obtain more value to meet your needs versus purchasing standalone components and service agreements. An Integrated Service Agreement offers three service tiers including upgrade options.

ENTITLEMENTS	ESSENTIAL A flexible, entry level offering focused on support and repair with the option for labor	ENHANCED Coverage of all your support services for better protection	PREMIER Complete coverage and protection that helps you optimize your investment with priority service and proactive engagements
24X7⁽¹⁾ REMOTE SYSTEM SUPPORT⁽²⁾ Access to technical support engineers via chat, phone or the Live View Support™ virtual tool; the online support center including Knowledgebase, interactive forums, and product notifications; and the ability to download the latest software update.	✓	✓	✓
ANNUAL REPAIR AGREEMENT Access to repair inventory and the ability to restore automation equipment to like-new or better condition with our remanufacturing and exchange services that enhance performance and extend product life.	✓ Customer chooses spend and replacement offered for faster turnaround, if available.	✓ Inclusive agreement that covers all repairs ⁽³⁾ . Replacement offered for faster turnaround, if available.	✓ Inclusive agreement that covers all repairs ⁽³⁾ . Replacement product guaranteed ⁽⁴⁾ .
CONTRACT USAGE ANALYTICS & REPORTS Performance dashboards that allow users visibility and insight to take more effective action.	✓	✓	✓
FIELD SERVICES Access to highly skilled engineer specialists who can supplement your on-site workforce whenever you need them for emergency and non-emergency needs. Examples include support in managing product obsolescence and migration planning, preventive maintenance, troubleshooting, programming and startup services.	+	✓	✓ Emergency callout included at no charge (when engaged with Technical Support)
INSTALLED BASE EVALUATION™ An annual detailed analysis of your critical plant assets and condition to help you make data-driven decisions regarding support and obsolescence management.		✓ Includes access to My Equipment	✓ Includes access to My Equipment with asset optimization consultation.
CONTRACT MANAGEMENT A named customer success individual will conduct periodic reviews leveraging data and analytics and share these insights with you to help maximize the value of services purchased and enable you to manage your investment more efficiently.			✓
SCHEDULED MAINTENANCE Biannual two-day engagement with Rockwell Automation engineering specialists to review the health of your Allen-Bradley® installed base and provide recommendations for optimization and system improvements.			✓
LEARNING+ TRAINING SUBSCRIPTION A combination of self-paced e-learning, instructor-led courses, labs and additional training content - all in a virtual environment.	+	+	+
PARTS MANAGEMENT Rockwell Automation owned and managed critical spare parts located either on-site or at a remote location, to help you maximize equipment uptime while reducing overall inventory carrying costs.	+	+	+

(1) English language available 24x7. Support in local languages available during normal working hours of 8-5 Monday – Friday.

(2) The purchase of an agreement offers the ability to purchase Learning+ subscriptions at prices only available to support agreement Customers.

(3) Exclusions may apply.

(4) Upon completion of Installed Base Evaluation.

2.1. Summary of Benefits



Maximize

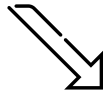
asset reliability & uptime

Better understanding and control of your installed base assets

Availability of parts when you need it

Quick, easy access to support

Improved mean time to repair



Reduce

total cost of ownership

Visibility of contract usage and data for decision-making

Priority repair service and access to repair inventory

Availability of engineering support when you need it



Optimize

installed base investment

Interactive tools help you manage your installed base and allow better collaboration

Scheduled maintenance

Access to digital insights for better decision-making

Options to manage repairs and inventory quickly and effectively



Supplement

your technical workforce

Access to skilled engineers and product specialists

Leverage virtual support tools, learning resources and modern training tools

2.2. Essential Support Level Summary

A flexible, entry level offering focused on support and repair with the option for onsite technical support. Entitlements include:

- Remote Technical Support
- Repair Services
- Reports & Analytics
- Option for Field Services
- Option for Learning+ Training Subscription
- Option for Parts Management

2.3. Enhanced Support Level Summary

Coverage of all your support services for better protection. Entitlements include:

- Remote Technical Support
- Repair Services
- Field Services
- Installed Base Evaluation
- Reports & Analytics
- Option for Learning+ Training Subscription
- Option for Parts Management

2.4. Premier Support Level Summary

Complete coverage and protection that helps you optimize your investment with priority service and

proactive engagements. Entitlements include:

- Remote Technical Support
- Repair Services
- Field Services
- Installed Base Evaluation
- Contract Management
- Scheduled Maintenance
- Reports & Analytics
- Option for Learning+ Training Subscription
- Option for Parts Management

3. Support Defined

Standard support entitlements are those included with each tier of the agreement. If applicable, a technical support professional will determine whether a customer is eligible for support based on the service level tier.

3.1. 24X7 Remote Technical Support

Rockwell Automation remote technical support provides technical assistance for installation, configuration, troubleshooting, diagnosis, basic instruction programming and best practice recommendations. Remote Technical Support also includes access to:

3.1.1 Phone Support: Immediately address issues with phone support. Our specialists are ready when you need them, 24x7x365.

3.1.2 Live View Support Tool: An enhanced support experience connecting you with Rockwell Automation technical specialists leveraging a live video feed and augmented reality capabilities.

3.1.3 Online Support Center (Knowledgebase): The Rockwell Automation Support Center is your online resource for technical information, support, and assistance. Increase your productivity by finding solutions to technical questions more quickly - saving both time and money. The support center lets you search the Knowledgebase for answers to your questions, interact with peers through forums, submit questions online, bookmark information using the "Your Account" feature, request notifications of updates and chat with our skilled engineers. Maintained by the same engineers who provide your support, the Support Center houses the Knowledgebase, an online database that we update with the hardware and software solutions from actual support service tickets. The Knowledgebase, included with all support agreements, provides you with access to nearly 40,000 technical notes, documents, and solutions in your preferred language. In addition, you can submit questions and chat live with our Technical Support Engineers in your local language.

3.1.4 Chat: Online and mobile-friendly feature found on our Online Support Centers provides access to chat with Technical Support Engineers.

3.1.5 Submit a Question via Email: When you don't need an answer right away, submit a question via email to one of our Technical Support Engineers.

3.1.6 Interactive Forums: See what your peers are saying, ask and answer questions and network with other industry professionals.

3.1.7 Software Downloads and Updates: Download software, firmware, or other updates via the Web using your product serial numbers and the name of the registered user.

3.2. Repair Services

Remanufacturing services is our proprietary process of restoring used Allen-Bradley® or Reliance Electric equipment to “like new” condition, to enhance performance and extend product life. Our remanufacturing facilities use the same high-quality parts, standards and specifications as the original manufacturing process.

- **Essential Support Level Entitlements:** Customer chooses the level of repair spend and will have access to exchange units for faster turnaround, if available. This agreement will cover all Remanufacturing/Repair transactions until the pre-determined cap is reached, or this agreement reaches expiration. Exchange units will be offered as opposed to a standard repair process at no additional cost, subject to availability of stock and per the customer preference. Once the agreed upon cap is reached, the customer will be notified via email and will have visibility of their repair usage in the myRockwellAutomation portal. Transactions and cost that exceed the agreement amount will be billed to the customer monthly against the purchase order initially provided for the agreement. If unused funds remain at the end of the contract term, 50% of the unused amount can be credited towards a renewal of the agreement if the renewal is completed on time and at equal or greater value.
 - Rockwell Automation is responsible for notifying the customer when the cap has been reached.
 - Any unit covered under an existing warranty will not apply to the cap.
- **Enhanced Support Level Entitlements:** Inclusive agreement that covers all repairs. Exchange offered for faster turnaround, if available (exclusions may apply). Rockwell Automation will provide Remanufacturing and Exchange services in accordance with the equipment identified during the Installed Base Evaluation. Under this agreement all repairs for hardware identified during the Installed Base Evaluation (with the exceptions listed below) will be covered during the duration of this agreement. Exchange units will be offered as opposed to a standard repair process at no additional cost, subject to availability of stock and per the customer preference.
- **Premier Support Level Entitlements:** Inclusive agreement that covers all repairs (exclusions may apply). Replacement product guaranteed (upon completion of an Installed Base Evaluation). Rockwell Automation will provide Remanufacturing and Exchange services in accordance with the equipment identified during the Installed Base Evaluation. Under this agreement, all repairs for hardware identified during the Installed Base Evaluation (with the exceptions listed below) will be covered during the duration of this agreement. Exchange units will be offered as opposed to a standard repair process at no additional cost and will be added to standard stock upon completion of the Installed Base Evaluation.

3.2.1 Repair Exclusions and Clarifications Defined

This agreement applies to the remanufacture/repair of Rockwell Automation repairable products. Non-Rockwell Automation, third-party products that Rockwell Automation deems repairable can be repaired on a transactional basis by contacting your local Allen-Bradley authorized distributor or sales office. Products that are deemed to be consumable are not covered by this agreement.

- **Remanufacturing Services**
 - Any fees associated with an unlike exchange, late core return, and non-return of a core, will be billed in addition to normal contract billings against the initial purchase order provided for this agreement.
- **Industrial Repair Services**
 - This agreement does not cover the repair of non-Rockwell Automation, third-party products that Rockwell Automation deems repairable.
 - This agreement does not cover the repair or replacement of consumable products.
- **Direct Replacement**
 - This agreement does not cover the purchase of direct replacement or new products.
 - This agreement does not apply to potentially available upgrade programs.
- **Obsolete Products**
 - Obsolete products that are no longer repairable are not guaranteed in this service and our best effort to support will be offered.
- **High Horsepower (HP) Drives and Medium Voltage Drives Equipment**
 - Frame 5 Drives and larger, as well as Medium Voltage Drives products are repaired at the component level. For these products, the customer will work with Remote Support to determine the component that needs repair and the process to remove and install. If field service is requested to assist with this work, the customer can use the hours available in the field service section of this agreement or work with their local Allen-Bradley authorized distributor to schedule.

- In the instance of a catastrophic failure where the entire unit needs replacing, the customer will work with Rockwell Automation to understand lead times. These products will not be available for Priority Exchange.
- **On-site Labor**
 - If on-site field labor is required to assist with replacement or installation of parts, hours can be used from the field service component of this agreement. If this agreement does not include field labor hours, then labor can be arranged by contacting your local Allen-Bradley authorized distributor or sales office.

3.2.2 Remanufacture/Exchange Process

- Upon failure of a repairable module, the module will be returned either directly to Rockwell Automation or to the local Allen-Bradley authorized distributor.
- The distributor will process the repair with the designated Rockwell Automation remanufacturing/repair facility.
- Upon completion of the remanufacture /repair, the unit will be returned as directed and a no charge invoice will be generated.
- Any unit deemed non-repairable will be returned less repair
- Priority Service (Exchange) for Essential and Enhanced: When stock is available in the hub (approximately 65% of the time), Priority Service will be offered to expedite the process and get a repaired unit back to the customer. For Priority Service the process below will be utilized
- Priority Service (Exchange) for Premier: Priority Service will be offered to expedite the process and get a repaired unit back to the customer. This service will not be guaranteed until the Installed Base Evaluation is complete, and time is allowed for us to adjust the hub stock. This is typically 6-8 weeks past the completion of the IBE. Prior to this date, we will offer Priority Service when stock is available. Once we have the opportunity to adjust stock this will be guaranteed, and exchange units will be dispatched within 24 hours of request. For Priority Service the following process will be used:
 - A replacement module will be provided in exchange for the failed core (subject to inventory availability).
 - Modules returned for exchange must be returned in repairable condition. Modules declared non-repairable due to physical damage will be returned to the customer. At which time, the customer will be billed their normal net purchase price for a new unit less the customer's standard net advance exchange price. The standard net remanufacturing price will be applied to the cap.
 - If the Exchange program is used, a replacement will be shipped in advance of receipt of the failed core. The failed core must be returned within 15 days of receipt of the advance module. Failure to return the core within 45 days will result in a billing for the customer's normal net purchase price for a new unit less the customer's standard net advance exchange price. The standard net remanufacturing price will be applied to the cap.
 - Priority service is not available for countries with import and export laws require the same unit to be repaired and returned.
 - Priority service is not available for regulated industries that require the same unit to be repaired and returned. Priority service is not available on Frame 5 Drives and/or larger Medium Voltage Drives product. Repair for these products is at the component level and only commonly used components will be available via exchange.

3.2.3 All Repaired Equipment Inclusions

1. Installation of application updates/enhancements
2. Replacement of inoperable/aged components
3. Parametric testing
4. Cleaning and cosmetic restoration

3.2.4 How We Diagnose Problems

1. Your equipment is thoroughly cleaned to remove all contamination
2. Diagnostic tests are used to locate any inoperative components
3. Functional testing performed on designated platforms
4. Circuit analysis isolates marginal components

5. Inoperative, marginal and aged components are replaced to support long-term performance of the unit
6. State-of-the-art equipment verifies total circuit board quality
7. Circuit boards are coded and tagged
8. Handling, packaging and shipping are performed in a static-free environment
9. [See our remanufacturing process in action](#)

3.2.5 Warranty Offered on Remanufactured Equipment

12-Month Warranty: Your failed or malfunctioning product is sent through our proprietary process and returned via the normal shipping process. This service includes a 12-month warranty on the entire unit.

3.3. Reports & Analytics

To provide better visibility of agreement engagements (such as service ticket history, etc.) and usage, your Integrated Service Agreement provides you access to data and information pertinent to your agreement via the [myRockwellAutomation](#) portal. Included within this site are applications that will include information on your site's specific agreement details, agreement usage, information on your installed base and status of repairs.

3.3.1 My Services

Under the My Services application of the myRockwellAutomation portal, customers will be able to sign up for access using the authorization number provided to them upon agreement initiation and provided in their welcome email. My Services will provide customer information regarding their current agreements including what coverage levels have been selected as well as the status of these agreements including start and end dates.

My Services will also include all customer remote support ticket interactions for the entire site. This information will include all ticket numbers and notes from those interactions and will be sortable via different filters.

Also in the My Services application is the Insights section. This section is exclusive to Integrated Service Agreement customers and will include usage on remote support, field service and repair interactions. This information can be sorted with different filters to show adoption and engagement of your users. Some of the deliverables of the Integrated Service Agreement are drawn down components that have caps included with their usage. The status of these components will be shared in this section and will display how much of the service agreement has been used and how much is remaining.

[Access My Services Now](#)

3.3.2 My Equipment

The My Equipment application of myRockwellAutomation is a deliverable with the Installed Base portion of this agreement.

[Access My Equipment Now](#)

3.3.3 My Repairs

The My Repairs application of myRockwellAutomation is where a customer can access specific repair transactions and get details regarding the status of these repairs.

[Access My Repairs Now](#)

3.4. Field Services

Our global network of over 600 field service professionals is available to assist customers on-site or remotely. From modernization guidance to emergency callout, our engineers can help customers increase uptime, optimize performance and support the lifecycle of their installed base.

Rockwell Automation Field Services enable customers to pre-purchase a defined number of hours for Rockwell Automation scheduled and emergency services at a lower, fixed hourly rate.

This agreement will provide customers with access to a Rockwell Automation field service professional who will work under the direction of the customer and may be used on an as-needed basis towards the purchase of transactional (non-contract) emergency service, scheduled service or other non-fixed scope services provided by Rockwell Automation as described in this Statement of Work section.

When the Customer calls to schedule service, the value of each service confirmation will be deducted

from the balance of service value under the contract. Once the applicable hours are depleted, a notice will be sent via email to the customer as well as in the on-demand reports available on myRockwellAutomation. If additional service is requested, a service engineer will be scheduled, and these hours reported to the customer. These overages will be billed monthly against the initial purchase order issued for the agreement. If unused hours remain at the end of the agreement, then up to 50% of the unused hours can be carried over and credited towards the purchase of an on-time renewal of an Integrated Service Agreement, provided the agreement is renewed on time and at equal or greater value.

- **Essential Support Level Entitlements:** Optional upgrade
- **Enhanced Support Level Entitlements:** Access to highly skilled engineer specialists for on-site support.
- **Premier Support Level Entitlements:** Emergency callout included at no charge (when engaged with Technical Support). Organized by product specialty and by location, our support professionals are on call to make sure that your plant is always up and running .

3.4.1 Labor

Labor is time spent working at a customer's request, either on-site or off-site. This hourly charge will be applied to billable labor time incurred in conjunction with on-site services allowable under this agreement. Overtime is billed at some value multiplied by labor hourly charge. Overtime charges differ by country. Contact your local Allen-Bradley authorized distributor or Sales Office for current callout services rates and delivery terms.

3.4.2 Waiting Time

Waiting time is non-working time spent waiting at the customer's request or due to circumstances beyond Rockwell Automation's control due to job site conditions. It will be deducted from the contract value per the rate schedule that is applicable for the time of day, and day of the service.

3.4.3 Travel

The travel billing method will be portal to portal and will be based on the agreement contract hourly rate. This hourly charge will be applied to billable travel time incurred in conjunction with on-site services allowable under this Agreement. Billable travel time shall be determined by the field resource's actual travel time as calculated from point of origin to customer destination and onward to the next destination.

3.4.4 Expenses

Expenses incurred in association with local travel (including, but not limited to, tolls and miscellaneous) are billed at cost and are subject to a 10% administrative fee. In addition, if receipts are requested an administrative fee may be applied. Non-local travel applies when the field resource is dispatched from outside of three hours roundtrip. Expenses incurred in association with non-local travel (including, but not limited to, ground transportation, hotel, and meals) will be billed as a flat rate charge per night. See current callout services rates and delivery terms.

Additional expenses may apply and include, but are not limited to, air travel, permits, tolls, customs fees and other incidentals. Such expenses are billed at cost and are subject to a 10% administrative fee.

Material expenses are NOT included in this Agreement and will require a separate Purchase Order. Material expenses will be billed according to Rockwell Automation's standard pricing in effect at the time of services, except in cases of prior contractual agreement.

3.4.5 On Call Time

On call time is non-working time spent off-site at the customer's request ready to respond. The value of this time will be deducted from the agreement per the rate schedule that is applicable for the time of day, and day of service.

3.4.6 Receipts

Receipts for expenses that are requested by the customer are subject to an administrative fee that varies by country. See current callout services rates and delivery terms.

3.4.7 Field Engineering Labor Support Activities

The value of this Agreement may be redeemed for, but not limited to, the following on-site support activities:

- Labor services related to Industrial Automation Equipment and Software support (Variable Frequency AC Drives, DC Drives, PLCs, SLCs, PanelView™ systems, etc.)
- Predictive/Preventive Maintenance; Breakdown Coverage including Emergency Call-Out, Scheduled Call-Out, Troubleshooting & Repair

The value of this Agreement may not be redeemed for on-site support activities related to, but not limited to, any of the following:

- Nuclear facilities or applications
- Chemical demilitarization
- Weapons manufacturing
- Military and defense systems
- Offshore oil and gas applications
- Companies owned in whole or in part by a government entity
- Projects intended for shipment to an embargoed destination
- Work locations categorized as Travel Suspended or Travel Restricted according to the Rockwell Automation High Risk Area Travel Security Process
- Customers with existing pricing agreements in effect with Rockwell Automation at time of service
- Fixed scope services provided by Rockwell Automation

3.4.8 Emergency On-Site Services

The field engineering labor hours can also be used for emergency on-site services. These services are available for assistance with an unresolved emergency issue that directly affects an existing installation, is creating a loss of production situation, and cannot be resolved remotely by a Rockwell Automation Technical Support engineer. If an emergency situation exists and is identified when service is requested, an engineer will be dispatched within 24 hours.

At the Premier Tier of an Integrated Service Agreement, Emergency On-Site Services are included and the hours used do not debit the block of hours included in the agreement. A Field Service Professional will only be dispatched to assist with a product that is covered by the customer's Integrated Service Agreement.

3.4.9 Support Process

Customer will use their designated Integrated Service Agreement telephone number to call the Rockwell Automation Technical Support Center for issue resolution. Customer will provide their authorization number to validate that they have an active Agreement. Once validated, the Technical Support Engineer will begin to troubleshoot the issue. After the Rockwell Automation Technical Support Engineer understands the problem, he/she has the discretion to identify the problem as an emergency or as a non-emergency issue. If Customer requests Emergency On-site Services by a Field Service Professional, the Rockwell Automation Technical Support Engineer will verify if the issue qualifies as an emergency before initiating a request to dispatch a Field Service Professional.

Subject to the Emergency On-site Services Policies, Rockwell Automation will cover the cost of dispatching a Field Service Professional with no additional travel charges to Customer. Please note, Emergency On-site Services do NOT include parts. If parts are required, please contact the local Allen-Bradley authorized distributor.

3.4.10 Emergency On-site Services Policies

Emergency Definition: An issue or event that has or immediately threatens to compromise the safety of the Customer's personnel, that stops, has stopped, or seriously hampers production, data recording and processing or product quality.

Emergency On-site Prerequisites: Before being dispatched, the Rockwell Automation Field Service Professional and Technical Support Engineer must confirm the following prerequisites:

1. Rockwell Automation and Customer agree that the emergency issue is unresolved and plant production is experiencing downtime due to this issue.
2. The problem is related to Rockwell Automation equipment that is covered by Customer's Integrated Service Agreement.
3. Customer's facility must have knowledgeable, qualified technicians capable of performing basic troubleshooting tasks as directed by Rockwell Automation's technical support team. If Customer lacks qualified resources, on-site support can be purchased through Customer's local distributor at the published callout rates.

Dispatch Response Time: A Field Service Professional will be dispatched within 24 hours.

Maximum Working Time: For safety compliance of the Rockwell Automation Field Service Professional and Customer, at no time will a Rockwell Automation Field Service Professional work more than a maximum of 16 hours (including travel time) during any 24-hour period or according to local government policy - whichever is the most stringent.

3.5. Installed Base Evaluation

An Installed Base Evaluation™ (IBE® Service) will begin with Rockwell Automation collecting and documenting details regarding installed equipment, storeroom inventory and condition, panel condition, environmental condition, and wiring / grounding condition and ventilation condition. The Installed Base Evaluation begins by developing a plant hierarchical model to define the functional location of the installed parts and will include the following data collection:

- Installed equipment

- Spares and stash inventory
- Plant operating hours
- Environmental conditions; grounding, wiring, ventilation, and possible corrosive conditions, etc.

This report is based only on a visual inspection of equipment in the operating state and the physical location that exists at the time of inspection. Neither the part inspected, nor the surrounding equipment is moved, taken apart or otherwise investigated. Thus, the content provided in this report is based only on information that is readily discernible by visual observation.

3.5.1 Installed Base Evaluation Deliverables

Rockwell Automation will provide an executive summary that will include ranking and prioritization of tasks from all evaluations, with more detailed rankings within each individual evaluation report. This report will be presented to the customer with one review cycle. The IBE provides the following:

- Review and categorization of inventory focusing on quantifying four major categories of inventory:
 - Active: Necessary to support installed process equipment
 - Inactive: "Obsolete" inventory not required to support process
 - Excess Active: Active, but overstocked inventory
 - Stash: Valuable inventory throughout the plant that is not recorded or visible to the inventory system
- Review and categorization of the lifecycle to provide the information, analysis, and recommendations needed to mitigate the risk of aging assets and protect the investments made in the automation infrastructure:
 - Active (Green): Most current offering within a product category
 - Active Mature (Light Green): Product is fully supported, but a new product exists. Gain value by migrating.
 - End of Life (Yellow): Discontinued date announced; actively execute migrations and last-time buys.
 - Discontinued (Red): New product no longer manufactured/procured; repair/exchange services may be available.
- Environmental conditions: grounding, wiring, possible corrosive conditions, ventilation, etc.
- Recommended Spares Report using product Mean Time Between Failure (MTBF) and operating hours.
- Rockwell Automation inventory analysis to provide a snapshot view of current inventory levels in storeroom and stash compared to recommended spares. This analysis also identifies insufficient inventory, excess inventory and lifecycle status of installed base.
- Non-Rockwell Automation Installed Base (if applicable) to provide listing of installed third-party products.
- Detailed Installed Base to provide a detailed installed by location which includes part number and quantity in each location.
- Products by physical location to allow customer to search by part number to find all areas that the part is installed.
- Standard, customer-developed physical hierarchy to assign physical asset locations of each product identified during the Installed Base Evaluation service

3.5.2 Remediation

Remediation is not included in the scope of supply. The Customer may or may not choose to follow through with the recommended corrective actions and/or retesting. Depending on the type and severity of a recommended action, remediation scheduling could be integrated into the process. This may impact scheduling and completion of the required tasks. If the Customer requests remediation and/or retesting, this time will be invoiced separately at additional charge.

3.5.3 My Equipment Subscriptions

A subscription to My Equipment is included with the purchase of an Integrated Service Agreement. Access to the My Equipment application makes it simple to regularly view dashboards and reports, perform analysis, and evaluate the risk within the installed base. Our Installed Base Evaluation data and access to My Equipment are designed with longevity and standardization in mind, making it an integral part of your maintenance planning process over time.

Access to My Equipment is an enhancement to the [myRockwellAutomation](#) digital experience. My Equipment provides intuitively designed installed base dashboards and reports, made available through an online portal. The My Equipment subscription will be invoiced upon completion of the Installed Base Evaluation.

A subscription to My Equipment includes:

- Interactive asset inventory reports and dashboards of all Installed Base Evaluation data and recommendations
- Enterprise-level reporting and charts
- Comprehensive obsolescence risk analysis
- Filterable physical hierarchy
- User intuitive design to simplify decision making
- Single sign on with Knowledgebase existing account information
- Access to delegated administrator feature to enable simple sharing across your team
- Ongoing features as they are added to the My Equipment subscription service over the term of the contract

For new contracts, the My Equipment subscription shall commence upon issuance of the Installed Base Evaluation report. For renewals, the My Equipment subscription will commence upon receipt of purchase order and at the beginning of the stated contract term.

3.5.4 Asset Optimization Consultation

A Rockwell Automation Asset Optimization Consultation is designed to support the decision-making process on where to initiate improvements and how to implement an effective maintenance strategy. An Asset Reliability Professional will provide equipment knowledge, industry expertise, and consultative services to deliver prescriptive action plans and business strategies specific to your site goals. Rockwell Automation will make solution recommendations based on the biggest challenges or most important priorities. The evaluations help bridge the gap between current state and end goals.

Asset Optimization services include the following:

- Site interview and walk-through
- Assessment Reports:
 - Action plan prioritization workbook including associated analytical data sheets
 - Presentation file containing highlights of report findings, recommendations, plans
- Report review meeting

3.5.5 Site Interview and Walk-through

A Rockwell Automation Asset Reliability Professional will conduct a site walk-through and interviews with designated customer representatives, during which the following will be covered:

- Facility tour to better understand customer's equipment, production processes, and greatest areas of lifecycle risk
- Document potential reliability/lifecycle issues associated with the equipment
- Perform an equipment/parts criticality analysis with customer's equipment care team

Following the site interview and walk-through, the Asset Reliability Professional will perform various analyses based on the documented findings.

3.5.6 Assessment Reports

Rockwell Automation will deliver Assessment Reports based on the site walk-through and interviews conducted. Reports will include the following:

- Equipment Criticality based Spare Parts Plans
 - On-site consultation work performing location/equipment criticality analysis
 - Obsolescence risk evaluation, spares gap recommended solutions
- MRO Inventory Optimization Plans
 - Data review and analysis of site storeroom issuances, equipment work orders, key performance indicators (KPIs)
 - Parts standardization/optimization strategies and parts asset management recommendations
- Modernization Plans Prioritized by Business Impact
 - Site impact criteria applied to data for forced ranked migration plans
 - Asset lifecycle planner and detailed reports provided
- Asset & Plant Optimization by Business Impact

- Plant-specific top improvement initiatives, proactive asset reliability/maintenance strategies

3.5.7 Report Review Meeting

A report review meeting will be held upon completion of the reports. Rockwell Automation will provide an executive summary that will include ranking and prioritization of tasks from all evaluations, with more detailed rankings within each individual evaluation report. Estimated delivery of the reports is within four weeks after the final data collection and site visit. Reports will be presented to Customer with one review cycle during the second quarterly executive business review.

3.6. Contract Management and Customer Success

Rockwell Automation aims to ensure the Customer obtains the most value possible from the Services covered by this Support Agreement. Customer is entitled to engagement from the Customer Success organization as detailed below.

A Rockwell Automation Customer Success Manager will be assigned to act as Customer's primary commercial contact for non-technical inquiries. The primary function of this role is to align the Support Agreement with desired Customer Business Outcomes. Customer engagements will include Customer Kick-off, Business Reviews, escalations, and other activities as the customer and Customer Success team deem necessary.

Customer Success will facilitate the alignment of scope delivery with the Support Agreement. If there is a change needed, Customer Success Manager will leverage the change request process to support the business outcomes.

3.6.1 Customer Kick Off

A Customer Success Manager will engage the designated Customer contact at the initiation of the Service order. The Customer Success Manager will organize an initial Customer meeting to overview the Support Agreement and associated Welcome Kit, discuss Key Performance Indicators (KPIs), and develop an engagement plan with the Customer. The Welcome Kit will include the Support Agreement entitlements and how to obtain the most usage and value from the Support Agreement entitlements.

3.6.2 Quarterly Business Review (Premier Support Level Only)

A focus will be put on quantifying the value associated with Support Agreement entitlement usage throughout the contract's lifecycle. The business review will summarize how support activities, Support Agreement usage, service level agreement performance, and scope changes align with KPIs and business value. These reviews occur on a quarterly basis.

Additionally, the Customer Success Manager will provide the following outcomes on a periodic basis:

- Validate customer objectives are being achieved throughout the Support Agreement lifecycle
- Highlight holistic Support Agreement data to identify opportunities for operational efficiencies
- Obtain feedback on system and support performance
- Identify trends in usage and alignment to industry
- Recommend any scope changes to realign Support Agreement with business outcomes

3.6.3 Escalation

Rockwell Automation puts a significant focus on the Customer's satisfaction with the Service. If the Customer is dissatisfied with the delivery of the Support Agreement, the progress with an existing incident or the value received from the Support Agreement, a request can be used to escalate the issue. Customer escalation invokes a higher level of management within Rockwell Automation to make a support issue even more visible. The Customer should notify the Customer Success Manager as soon as practical of the need to initiate the escalation process. This request should be made in writing if possible.

The escalation may be initiated for any of the following reasons:

- Incident resolution not performed in accordance with response times
- Lack of responsiveness
- Dissatisfaction with resolution
- Dissatisfaction with quality of service
- Dissatisfaction with the value of service

Any of the individuals listed as Designated Contacts may invoke the escalation process. Rockwell Automation expects to receive customer management contact information during the escalation. For additional details, see your Welcome letter information for instructions on escalation and required information.

3.6.4 Expansion of Scope

If, at any point in the life of the Support Agreement, the Customer should find that additional scope is required (beyond that documented in this Support Agreement) the Customer Success Manager would be the point of contact to initiate the expansion process. The Customer Success Manager will facilitate the engagement of Rockwell Automation resources to document the new Business Outcomes and proceed with the Documented Change Request (DCR) Process.

3.7. Scheduled Maintenance

Twice a year the assigned Customer Success Manager will work with the customer to proactively schedule two-day engagements with Rockwell Automation engineers to review the health of the Rockwell Automation installed base and provide recommendations for optimization and system improvements. These engagements will take place with a Rockwell Automation Field Service Engineer as well as required commercial resources, as needed.

3.7.1 Scheduled Maintenance and Corrective Services

- Trained engineers directly employed or supervised by Rockwell Automation will perform the maintenance service, when applicable, using the appropriate tools and test equipment.
- Maintenance will be rendered when required during Rockwell Automation business hours. Rockwell Automation and Customer will have agreed on the schedule of products to be maintained before the start of the maintenance work. Changes to this schedule will be made in writing only after mutual consent by both parties and then detailed for future reference.
- Pre-scheduled maintenance visits may only be canceled or changed if ten working days prior written notice has been issued by Customer to Rockwell Automation. Customer and Rockwell Automation shall agree the time to reschedule the canceled visit. On failure to provide the specified written notice, Customer will forfeit the scheduled visit.
- Should any additional maintenance visits be required outside of the allocated schedule, then the customer can choose to use hours from their field engineering labor hours to supplement the time and continue the work.

Rockwell Automation will provide maintenance advice and support as part of the scheduled visits. Typical activities performed are listed below:

- Preventive maintenance on identified critical equipment
- Systematic inspection and verification of correct operation
- Conduct a visual check of the system to confirm it is in a clean condition and connections are secure
- Implement operational checks of the plant systems in accordance with customer's requests
- Investigate ongoing issues and correction of malfunctions
- Service report of maintenance completed
- Advise on product obsolescence and assist with migration plan
- Review support products are available and working e.g. cables, software, programming tools
- Advise/develop stores procedures, best practices, storage methods
- Carry out the management of battery replacement periods as specified in Rockwell Automation product documentation.
- Program backups
- Provide basic refresher training and answer technical queries as requested

4. Support Upgrades Available Options Defined

Upgrades to an existing agreement must be quoted by Rockwell Automation. The following upgrade options are available:

4.1. Learning+ Training Subscription

Innovative education and training to close the skills gap. Continue to learn at your convenience; your return visits will resume where you left off in the course. Courses added will automatically appear in the available training of subscribers. [Learn more about our available Learning+ courses.](#)

- **Engaging Interactive Learning:** Each learning module contains activities, software simulations, and demonstration videos to help reinforce learning concepts.
- **Earn Credit for Courses:** Each lesson has knowledge assessment, requiring 80% to pass. Upon successful completion of the course, a learner will be awarded CEUs.
- **Easy to Access:** Available on any tablet or PC using Chrome, Safari, IE, Edge or Firefox. All content is narrated and has a viewable transcript.
- **Multiple Courses Available:** Over 15 courses across 6 major automation technologies including motion, drives, control, visualization and networking.

Active Rockwell Automation Service Agreement Customers (TechConnect and Integrated Service Agreements)			
FastPass	Single User	Group User	Multi-User
90-day access to a single course for a single user Catalog Number: LP-3TC	365-day access to all Learning+ library content for a single user Catalog Number: LP-12SU	365-day access to all Learning+ library content with minimum user count of 10 Supervisor Dashboard included Catalog Number: LP-12GU	365-day access to all Learning+ library content with minimum user count of 50 Supervisor Dashboard included Catalog Number: LP-12MU

4.2. Parts Management

A Parts Management Agreement (PMA) provides critical spares to help you maximize equipment uptime while reducing overall inventory carrying costs.

A PMA allows ready access to needed spare parts for your machines with Allen-Bradley equipment, all while we own and manage your spare parts inventory. This service delivers access and availability of critical spares to maximize machine uptime and throughput while reducing overall inventory carrying costs. [Learn more about Parts Management Agreements.](#)

5. How to Upgrade to Optional Services

Contact your local Allen-Bradley Authorized Distributor or Sales Office for more information or to order. [Find your Authorized Distributor or Sales Office.](#)

6. Product Family Coverage

After an Integrated Service Agreement level has been selected, the next step would be to specify the product families to be covered. Support is provided for all products that are listed within a product family (e.g., Automation Control Products) as [defined in this document.](#)

To provide support on older technology, we offer Legacy support. This is a separate product family with slightly different support options. These products are only supported in English. Product families are updated once a year to add new products to their respective product family and to move obsolete and older technology to Legacy.

7. How to Set Up Your Online Support Center and myRockwellAutomation Account

To begin using your Integrated Service Agreement, you need to create an account. This account will give you access to our Online Support Center and myRockwellAutomation which includes: My Services, My Equipment and My Repairs. Follow these steps to do so:

1. Navigate to our [Online Support Center](#)
2. Click on "Sign In"
3. Click on "Create an Account"
4. Enter your information into the form
5. To finish creating an account, you need to confirm that you own the email address that you used to create the account. To confirm your email address, click or tap the link in the email you received when you created the account. Note: Please confirm your email account as soon as possible, as you will not be able to access your account until you confirm your email address or mobile number. In addition, the email verification link will expire within 14 calendar days and the account will be removed.

If you have any further questions about creating an account, and/or if you're looking for account support tips, visit our [Account Support Center](#).

6. How to Use Your 24X7 Remote Technical Support

Customers will only receive the entitlements based on the product/software listed on their contract. For example, if a customer has Studio 5000® Subscription Software and tries to call into Technical Support for an issue on a CompactLogix™ Controller, they'll be denied support. Our Engineers will only provide support for products that are covered on the Customer's active support contract. Support contracts include: Integrated Service Agreement, TechConnect, Perpetual with Maintenance, Subscription, Toolkit, ThinManager® and ESAFE®.

6.1. Phone Support

1. Call **440-646-4377** (this is a North American phone number, for all other regions, [access our support phone number list](#) for all other regions).
2. Input your authorization number. You'll receive a designated authorization number that can be found within your welcome email and/or within your account profile on Knowledgebase.
3. Have the following information available to maximize the value of your call:
 1. Product name(s), description, and series/revision/version number
 2. System configuration and components, for example, operating system, etc.
 3. Sequence of events prompting your call
 4. Complete error message if applicable. In addition, you should communicate to the telephone support specialist who answers your call, the urgency of your situation so that we can respond appropriately. Use the following as a guide:
 - **Medium Urgency:** If you want to ask questions and/or need support regarding issues that have minimal or no immediate impact on your operation or business, you should categorize the urgency as MEDIUM. In normal situations, you agree that is acceptable if your issue is not resolved on an initial call.
 - **High Urgency:** If you want to ask questions and/or need support regarding issues that have a direct impact on your operation or business, you should categorize the urgency as HIGH. In high urgency situations, your system or process should remain operational but at less than full capacity. In these situations, you require immediate or same day resolution if possible.
 - **IMPORTANT:** If your system or process is down and you require an immediate

response, you should communicate this status to the telephone support specialist directly and classify it as VERY HIGH. In these situations, we leverage additional technical support and engineering resources to resolve your issue quickly. We expect you to implement technical support recommendations and to be available for immediate follow-up. If this does not occur, we may downgrade the urgency of your situation.

6.2. Chat Live

[Visit Knowledgebase](#) to chat live with Tech Support engineers.

6.3. Submit a Question (Email)

[Visit Knowledgebase](#) to submit a question to our Tech Support engineers.

6.4. Search Knowledgebase

[Visit Knowledgebase](#)

6.5. Explore Forums

[Visit Knowledgebase](#) and view our forums.

7. How to Use the Live View™ Support Tool

Share a real-time view of what you're seeing directly with our technical experts. This capability requires the user to download the Vuforia Chalk app on their mobile device and create a free account using their email address to log in. When calling in to TechConnect for support, our technical experts will share a code that can be used to unlock all features of Vuforia Chalk without the requirement of a license. This will enable a real-time view using your device's camera to assist in articulating the issue can expedite the troubleshooting process.

8. How to Use Your Repair Services

1. Call **440-646-4377** and have the following ready:

- Authorization Number
- Catalog Number(s)
- Serial Number(s)

Tip: Snap a photo of the product label.

2. Review concerns with a remote support engineer

- Attempt to resolve and fix issue remotely
- Validated failed unit requires remanufacture
- Transfer to Customer Care to begin repair process

3. Customer Care

- A Customer Care representative will check stock and review repair/remanufacturing options
- Priority exchange available and selected
 - Exchange unit will be shipped within 24 hours
 - Customer will be sent a shipping label
 - Send inoperative product to Rockwell Automation or have your local Allen-Bradley authorized distributor pick up and process return

- Customer must return core unit within 30 days or they will receive an invoice
- Economy repair initiated
 - Customer will be sent a shipping label
 - Send inoperative product to Rockwell Automation or have your local Allen-Bradley authorized distributor pick up and process return
 - Inoperative unit goes through repair process
 - Remanufactured unit returned (typically 10 business days)

4. Execution

- You will receive shipping label direction from Rockwell Automation
- Send inoperative product to Rockwell Automation or have your local authorized Rockwell Automation distributor pick up and process return
- If additional services are requested such as overnight shipping or field service support, an additional purchase order will be required
- Receive your repaired product

9. How to Access Your Reports & Analytics

1. Visit [myRockwellAutomation](#)
2. Navigate to the "Manage" Section
3. Go to "My Services" Overview

If you have any further questions about how to create an account, or if you are looking for account support tips, please visit our [Account Support Center](#).

10. How to Use Your Field Services for Scheduled or Emergency On-site Services

1. Call **440-646-4377** and have the following ready:
 - Authorization Number

Tip: Snap a photo of the product label.
2. Review concerns with a remote support engineer
 - Attempt to resolve and fix issue remotely
 - Determine severity
 - Validate skill set of engineer required
 - Transfer to Customer Care to process repair
3. Customer Care
 - Customer Care Representative will check resource availability and coordinate with customer timing of getting an engineer to the Customer's site.
 - Customer will receive confirmation upon scheduling of an engineer.
 - Review repair/remanufacturing options.

11. How to Leverage Emergency Callout Support for Premier Tier Agreements

1. Call **440-646-4377** and have the following ready:

- Authorization Number

Tip: Snap a photo of the product label.

2. Troubleshooting will be done by our technical support team
3. If issue is unresolved after the remote troubleshooting, the technical support team will qualify the issue as an emergency or non-emergency
4. If it's an emergency, technical support will then check the agreement for entitlement and approve the emergency callout
5. A Field Service Engineer will be dispatched

12. How to Access Your Installed Base Evaluation, My Equipment and Asset Optimization

During contract kickoff and initiation, you will be assigned a Rockwell Automation Project Manager who will contact the agreement owner and will work with your location to schedule and perform the Installed Base Evaluation. These engagements often take multiple days, and the project manager will work with you to find an appropriate window to visit your location and perform the service. Details of the work to be performed can be found in Section 3.5.

After the data collection is complete, the data is taken back to Rockwell Automation where we validate and make sure that everything is correct. Upon completion of this activity, we prepare our report and will review this information during our first quarterly business review.

Once the installed base information has been reviewed and presented to the Customer, it is loaded into My Equipment on the myRockwellAutomation portal. This is the same location and system that customers access their usage and analytics data. In this system, customers will have a digital view of the collected data and up-to-date lifecycle status information.

For Premier customers, the next engagement is the Asset Optimization Consultation. Similar to the Installed Base Evaluation, a Rockwell Automation Project Manager will be assigned and will proactively contact the agreement owner to work with the location to schedule and perform the work. Details of the work to be performed can be found in Section 3.5.

13. How to Access Your Contract Management Information

For applicable accounts, a Customer Success Manager will be assigned to the agreement and will proactively contact the defined customer contract owner to set up communications and share contact information.

Communication with the Customer Success Manager and regularly scheduled engagements will occur as well as digital touch-points through the course of the agreement.

If the need arises to contact the Customer Success Manager between these engagements, the customer will have been provided contact information (email and phone) to engage with the Customer Success Manager.

14. How to Use Your Scheduled Maintenance

During the first and third quarter reviews, the Customer Success Manager will proactively work with the defined

Integrated Service Agreement to review business goals and offer suggested engagements for the Scheduled Maintenance portion of the agreement. If the customer has a need in between these engagements, they can contact their Customer Success Manager (as detailed above) to engage in the Scheduled Maintenance engagements.

The type of work that can be completed with the Schedule Maintenance portion of the agreement are detailed above in Section 3.7.

Once the requested work is defined, the Customer Success Manager will be the point person for working between the customer and the Rockwell Automation delivery teams to ensure that work gets scheduled and completed.

15. How to Use Your Learning+ Training Subscription

Upon receipt of the email confirmation for purchasing Learning+:

1. Follow the email link to [myRockwellAutomation](#), and register as needed.
2. Navigate to the apps page
3. Select the “e-learning” icon
4. Select your course
5. When prompted, enter your assigned access code
6. Your single course or all content will unlock based on your purchase type.

16. How to Access Your Parts Management Services

Follow the instructions within your Parts Management welcome kit.

17. How to Access Software, Firmware and Other Updates

If you have purchased an Integrated Service Agreement, you can [download software](#), firmware or other updates via the Web using your product serial number(s) and the name of the registered user. To download software or firmware updates, hot fixes or patches, navigate to our [Online Support Center](#) and select the “Capability and Downloads” section.

Important: To download updates, you must have Internet Explorer 5.5 or higher with 128-bit encryption/cipher strength and a high-speed connection. Average download speed is 5 minutes outside of peak hours, 11 a.m. to 3 p.m. ET. Some updates are available as Zip files and require the WinZip application.

18. Other Support Agreements (TechConnect Support, Toolkits, etc.)

Contact your local Allen-Bradley Authorized Distributor or Sales Office to learn more about our other support options.

19. Glossary of Terms

Augmented Reality (AR): Provides the ability to superimpose computer-generated images on a user’s view of the real world, offering a composite view.

Case Handling: Rockwell Automation handles cases that require further investigation as a priority with automatic escalation procedures, and calls the Customer back to provide a progress update if an answer is not immediately available.

Case Resolution Follow-Up: For cases where Rockwell Automation could not confirm resolution on the initial call, the Customer will receive a proactive follow-up within one business day (target response) to confirm that the problem was resolved or continue troubleshooting, if necessary.

Educational Webinar: Our Educational Webinar series is designed to help you get maximum value from our tools and services. Learn about new methods to tackle your business challenges, discover ways to unlock the hidden potential of your business and leverage the industry expertise of Rockwell Automation.

Learning+ Training Subscription: Close the skills gap with a combination of self-paced e-learning, instructor-led courses, labs and additional training content - all in a virtual environment.

Genius Webinar: Genius Webinars are monthly hour-long technical presentations that provide tips, best practices and demonstrations for our products and solutions for TechConnect customers. Topics for these webinars include; frequently asked questions to our tech support teams, most viewed Knowledgebase article topics, industry trends and more! View or download all past recordings of on-demand webinars on Knowledgebase.

Grace Period Contract (GPC): 10-day grace period contracts may be awarded to current TechConnect customers who are requiring support for a product not listed within any of their product families on their contract. Certain rules and regulations are required to qualify for these contracts. For more information, see the "Customers without Support" section of this document.

Installed Base Evaluation™ (IBE®): Is much more than simply counting parts. It's a thorough analysis of your critical plant assets and their condition. For more information please see rockwellautomation.com.

One-time Incident Support: Rockwell Automation Customer Care will offer a one-time single incident support contract to new customers (or to customers who have had a grace period contract) for \$500 USD or equivalent in Local Currency. For more information, see the "Customers without Support" section of this document.

Online Support Center: The Rockwell Automation Support Center lets you search the Knowledgebase for answers to your questions, interact with peers through forums, submit questions online, bookmark information using the "Your TechConnect Account" feature, request notifications of updates and chat with our skilled engineers.

Technical Phone Support: Rockwell Automation phone support provides technical assistance for installation, configuration, troubleshooting, diagnosis, basic instruction programming and best practice recommendations. With an unlimited phone support agreement, a Customer can call as often as needed throughout the term of your Agreement. Standard hours of coverage are 8:00 a.m. to 5:00 p.m. Monday - Friday (based on your local calling time; Rockwell Automation observed holidays excluded). Information on Rockwell Automation observed holidays can be found via the Knowledgebase in article #819086.

Toolkit: For more detailed information on Toolkits and our PartnerNetwork™ program, visit rockwellautomation.com/partners to learn more about partnering with Rockwell Automation.

Vuforia Chalk: A mobile app for Android and iOS devices provided by PTC. Connects two people via video and lets each person draw digital, 3D annotations that "stick" to a physical object.

Welcome Kit: Essential support agreement information, support authorization number, local support telephone number, and user guide.

20. Useful links

[Find Your Allen-Bradley Authorized Distributor or Sales Office](#)

[Knowledgebase and Online Support Center](#)

[myRockwellAutomation](#)

[North America Direct Dial Guide](#)

[Remote Support Programs](#)

[Rockwell Automation Learning+ Courses](#)

[Rockwell Automation Website](#)
[Software Download Center](#)
[Software Registration Transfer](#)
[Support Services Product Family Guide](#)



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EUROPE/MIDDLE EAST/AFRICA: Rockwell Automation NV, Pegasus Park, De Kleetlaan 12a, 1831 Diegem, Belgium, Tel: (32) 2 663 0600, Fax: (32) 2 663 0640
ASIA PACIFIC: Rockwell Automation, Level 14, Core F, Cyberport 3, 100 Cyberport Road, Hong Kong, Tel: (852) 2887 4788, Fax: (852) 2508 1846

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Publication GMSC-UM006B-EN-P - February 2021
Supersedes Publication GMSC-UM006A-EN-P - November 2020
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