Sage Certified Solution

Requirements and testing process overview for Sage ERP X3

March 2015

# Introduction

This document describes the overall requirements and testing process that an organization must adhere to in order to submit an integrated solution for certification. This document is intended to help the reader understand what Sage expects of the organization’s solution and what deliverables need to be submitted to Sage in order to maximize the probability of successfully certifying the organization’s solution. This document contains the following sections:

* Introduction to Sage ERP X3 solution certification process
* Development and certification requirements
* Required certification testing deliverables
* FAQ
* Contact Sage

# Introduction to Sage ERP X3 solution certification testing process

The Sage solution certification process is intended to increase the Sage ERP X3 ecosystem with reliably tested and certified third-party solutions that provide end users with expanded functionality for various horizontal and vertical solutions.

The overall objective is to validate the seamless integration of a third-party solution with Sage ERP X3, and ensure the implementation and provisioning of the solution according to Safe X3 development standards and guidelines.

Sage begins the certification process after the organization applies for and pays fees for the Sage Certified Solution program (lease see the Sage Certified Solution Program overview and requirements document for details), and signs the Sage Certified Solution agreement.

Once an organization has applied for and been accepted into the Sage Certified Solution Program, the Sage certification testing process follows these steps:

1. The organization begins by submitting a questionnaire that helps Sage understand specific technical details about the third-party solution. The questionnaire is attached at the end of this document.
2. After reviewing the questionnaire, a Sage project manager gets in touch with the organization to work with it on ensuring that the organization provides the necessary deliverables for certification testing.
3. Once the organization has submitted its deliverables to the Sage project manager, Sage commences certification testing of the third-party solution.
* Depending on the integration complexity and methodology of the solution, the amount of testing time needed may vary. Generally, Sage attempts to complete testing within four business weeks.
* During the testing period the organization has a dedicated Sage project manager contact who will work with it to manage technical questions or updates.
* The Sage certification test team evaluates the organization’s solution deliverables; reviews the solution’s documentation; and conducts installation, test, and compliance checks.
* Sage may use a third-party company to conduct testing and review of the third-party’s solution and documentation.
1. Once testing and review is complete, Sage prepares and sends a certification results test report to the organization.
* If certification testing is successful, Sage sends the organization a test report indicating the solution has passed testing.
* If certification testing is unsuccessful, Sage provides a 60-day window where the organization can rework its solution and resubmit it for certification testing **one time only** to Sage at no additional cost. Beyond the 60-day window, additional certification fees may be required from the organization.

# Certification requirements

Third-party solutions must follow these certification requirements:

**1. Versioning**

**1.1 Sage product versions:** The organization will be required to test on the current and previous shipping version (v-1) and latest patch levels of Sage ERP X3. This will be known as the Base Test. Organizations must also commit to upgrading a certified solution to the next version upgrades of Sage ERP X3 per a mutually agreed upon timeline.

**1.2 Sage upgrades and retesting:** Retesting of certified solutions will only be required following **major** Sage ERP X3 upgrades, which will be clearly designated as “major” by Sage. Certified Solutions must additionally agree to support product updates (patch levels) from Sage, but retesting will not be required for these minor upgrades.

Sage ERP X3 certified solutions must support each **minor product update** within 60 days of its release (no retest required) and each **major** upgrade within 60 days of its release (retest required).

**1.3 Grace period exceptions:** If the organization cannot release an upgrade within the above grace periods, it can discuss an extension with the Sage ERP X3 product management.

**1.4 Solution upgrades:** The organization will be asked to recertify with a full retest after a major upgrade of its own solution and before releasing to customers. Major upgrades include adding significant new functionality, altering the schema, or creating interactions with a new Sage ERP X3 module.

**1.5 Third-party software:** Organizations must document the inclusion of any third-party software including controls, libraries, or products, and attest (in the Solution Questionnaire, see below) that the organization has rights to that distribution.

**1.6 Composites:** If a solution is a composite (a “multiple”—partly embedded and connected) then each part of the solution must follow the relevant guidelines below (clarify the location).

**2. Installation**

**2.1 Automation:** Solutions must offer automated installation wherever possible. Installation need not, however, be provided through a single installation program. Installation instructions must be clear and concise.

**2.2 Documentation:** The organization must document preinstallation requirements in user documentation.

**2.3 Dependencies:** The solution installer must automatically detect dependencies and alert users to conflicts and deficiencies in pre-installed products.

**2.4 Waivers:** If installation guidelines are not followed, organizations must provide a valid reason for not doing so and request a waiver from Sage ERP X3 product management.

**2.5 Use preinstalls:** Solutions must use Sage ERP X3 preinstalled compatible third-party integrated and accessory applications, if available.

**2.6 Unsupported tools:** Solutions must not install unsupported third-party integrated and accessory applications and must not overwrite supported products with different versions.

**3. Uninstallation**

**3.1 Required:** Solutions must provide a clearly documented method for uninstallation. An automated uninstaller is strongly preferred.

**3.2 No damage:** Solutions must uninstall such that Sage ERP X3 continues to function without damage.

**3.3 Data:** Uninstall may leave certain data, in order to maintain Sage ERP X3 stability and audit trails. Data from Sage ERP X3 and third-party solution must not be damaged during uninstall.

**3.4 Waivers:** In certain cases, organizations may request a waiver for uninstall requirements. Please contact the Sage product management team for a waiver.

**4. Functional minimums**

**4.1 Execution:** The solution must execute appropriately, exhibit stability, and function in accordance with user documentation.

**4.2 Demo:** The organization must provide sample data and a real-time demo to the testing partner.

* *Exotic hardware*: During testing, the organization must supply nonstandard/exotic hardware, software, and peripherals when absolutely necessary to perform a real-world test for the typical user profile. These may include such items as handhelds, specialized printers, and so on at the organization’s cost.
* *General functionality and stability test*: The solution must pass the minimum general functionality and stability test as defined by the testing partner and Sage, in cooperation with the solution partner, and executed in a real-time demonstration. This test will include stability of Sage ERP X3 during solution usage.

**4.3 Data integrity:** Solution must not damage Sage ERP X3 data integrity. Organization must attest that the solution does not create data concurrency, consistency, or integrity issues with Sage ERP X3.

**4.4 Database support:** Solution must support databases that Sage ERP X3 supports. Use Sage ERP X3 hardware and software requirements document for detailed information about the supported databases.

**4.5 Generally accepted accounting principles:** Organizations must attest that each certified solution follows generally accepted accounting principles as defined by the country in which the solution is sold.

**5. Documentation**

**5.1 Pretest documentation**

**Certification Statement:** Each solution must be submitted with a Certification Statement.

**Integration spreadsheet:** The organization must submit a list of integration points with Sage ERP X3, along with a list of all additions or modifications to Sage ERP X3.

**5.2 Adequacy of user documentation:** Solutions must provide user documentation with adequate clarity and completeness.

**5.3 Review:** Organizations must submit user documentation for review (soft copy or online). Sage will subjectively evaluate user documentation according to the above criteria.

**6. Performance/concurrent users**

**6.1** Sage urges all organizations to test for performance under different loads and numbers of concurrent users, but certification for concurrency will not be required.

**6.2** Organizations will, however, be asked to make a statement about the number of concurrent users supported, as part of the testing process. This number will be reported as unverified on the test report.

**7. Development Requirements and architectural guidelines**

**7.1 Credit cards:** If the solution processes credit cards, it must adhere to the payment card industry data security standard.

**7.2 Sage ERP X3 integration requirements:**

In order to be eligible for certification testing under the Sage ERP X3 Certified Solution program, your solution must adhere to one or more of the following Sage-accepted integration methodologies:

1. Sage ERP X3 Web Services
2. Sage ERP X3 4GL
3. Sage ERP X3 Import/Export (CSV, XML)

Please note that direct write integration to the Sage ERP X3 database is not an acceptable integration methodology and does not qualify for certification testing.

Organizations must comply with the SAFE X3 coding requirements/rules, which include:

* Sage ERP X3 activity code and identifier requirements.
* Sage ERP X3 window naming conventions.
* Sage ERP X3 process naming conventions.
* Sage ERP X3 menu/function naming conventions.
* Sage ERP X3 patch naming conventions.

Please refer to the following documents for details:

* Sage ERP X3 document titled “Sage ERP X3 add-ons for SAFE X3 products “ (Add-on\_rules\_ENG\_V2 0.pdf)
* Sage ERP X3 document titled “Sage ERP X3 development extensions on Sage ERP X3” (Dev-extensions\_on\_SageERPX3\_032012.ppsx)
* Sage ERP X3 development student curriculum

# Required certification testing deliverables

# The organization must submit the following three items to Sage in order for Sage to begin certification testing:

# Documentation package

Before the organization submits its documentation package to Sage, the organization should review the solution’s documentation to ensure that it is comprehensive and provides good clarity and details. Anyone outside of the organization should be able to easily understand the solution’s objectives.

The documentation package should include:

* User manual for the third-party solution.
* Installation guide that describes detailed step-by-step installation and uninstallation procedures, prerequisites, minimum requirements, and so on.
* Setup/parameter definition.
* Release notes and licensing guide.
* Test plan and test cases with expected outcomes.
* User Acceptance Test plans and testing scenarios.
* Training guides and/or training videos.
* List of activity codes and identifiers used.

# Software, activation keys or demo accounts

The organization will need to submit its software plus any activation keys or demo accounts that Sage needs to properly activate and test the third-party solution.

If the tested solution requires credit card information, the organization must provide Sage with dummy credit card account data for testing.

# A technical/development contact

The organization needs to provide Sage with the name and contact information for a technical or development contact who Sage can work with regarding questions or issues. This person must be available to Sage during the entirety of the certification testing period.

The organization should also review the Sage ERP X3 development guidelines and conduct a self-audit to correct any issues before submitting a documentation package and software to Sage. Sage will not begin certification testing until all deliverables are received from the organization.

# FAQ

# What if some of my deliverables (for example, release notes, test plans and cases, and so on) aren’t ready yet to send to Sage?

Sage requires the organization to submit all relevant documentation, software, demo accounts, or other deliverables in order to sufficiently test and certify your product. Sage will not begin certification testing until all deliverables are received.

# How long does it typically take for Sage to complete testing?

Testing times may vary depending on the development complexity and methodology of the third-party solution; however, Sage will generally attempt to complete testing and provide the organization with a report within four business weeks after the organization submits its deliverables.

# What happens if my solution doesn’t initially pass certification testing?

If your solution initially fails certification testing, Sage will provide you with a report describing the areas of and reasons for failure. You may resubmit your reworked solution for certification testing again **one time only** at no additional charge within 60 days after the date of the initial failure report:

After the 60-day grace period additional testing fees may be required.

# How much does certification testing cost?

Testing fees are included in your Certified Solution Program application fee. However, if your solution initially fails to pass certification testing, you may be required to pay additional testing fees if you resubmit your solution after the 60-day grace period.

Please note that your Certified Solution Program fee covers only your first certification test for your solution’s current version. Subsequent version compliance may require additional certification test fees. Please contact Sage if you would like information on the Sage Annual Patch and Version Maintenance plan.

# How do I remain patch and version compliant?

Per the Certified Solution agreement, in order to remain in the Sage Certified Solution program, you must maintain your solution’s compliance with the most recent Sage patch and version releases. And you must resubmit your solution for certification testing each time you have updated your solution with the most recent Sage ERP X3 major version releases.

# Contact Sage

If you have any questions about the Sage certification testing process or Annual Patch and Version Maintenance Plan, please contact:

**North America Europe**

Chris Corder Darren Liddell
Sr. Product Manager Sr. Product Manager
Sage Sage

6561 Irvine Center Drive North Park, Newcastle upon Tyne
Irvine, CA 98618 NE13 9AA

chris.corder@sage.com darren.liddell@sage.com

**Direct:** 949-864-7159 **Direct**: +44 (0)191 294 3102
**Toll-free:** 800-854-3415 x347159

Please complete and submit this form to chris.corder@sage.com (for North America) or darren.liddell@sage.com (for Europe) before sending software and documentation deliverables to Sage.

|  |
| --- |
| **1. Company and contact information** |
| Company name | Enter company name. |
| Street address | Enter street address. |
| City | Enter city. | State | Enter state. | ZIP | Enter ZIP. |
| Tech/dev contact name | Enter contact name. | Title | Enter contact title. |
| Mobile phone | Enter mobile number. | Work phone | Enter work number. |
| Email address | Enter email address. |
| Sage partner ID | Enter your partner ID if known. |
| **2. Solution Information** |
| [ ] New/proposed solution | [ ] Existing solution |
| Solution name | Enter solution name. |
| Solution description (Please also attach the solution’s data sheet.) | Enter solution description. |
| Solution deployment | Select deployment type | Solution license type | Select license type |
| Connected Application Choose an item.*External application or service requiring a connector to Sage ERP X3* | SAFE X3 Add-on Choose an item.*Functional extension or patch exposed within Sage ERP X3* |
| Both Connected and Embedded Choose an item.*External application or service requiring a connector to Sage ERP X3* |  |
| **3. Solution and installation details** |
| Describe the solution’s deployment complexity (see definitions below): | Click here to enter text. |
| Describe the solution’s development technology (see definitions below): |  |
| Describe impacted modules (Finance, Distribution, Production, Inventory, or Other): | Click here to enter text. |
|  | Click here to enter text. |
|  | Click here to enter text. |
|  | Click here to enter text. |
| **4. Technical information** |
| Sage ERP X3 version (v5, v6.x, or v7): | Enter #.Enter #. |
| Database (Oracle or MS SQL Server): | Enter #.Enter #. |
| Operating system (MS Windows, Linux, or AIX): | Enter #.Enter #. |
| Organization’s patch version: | Enter #. |
| **5. Technical prerequisites** *(hardware configuration, need specific equipment, and so on)* |
| 1. | Enter company name, contact, phone, and email address. |
| 2. | Enter company name, contact, phone, and email address. |
| 3. | Enter company name, contact, phone, and email address. |
| **6. Functional prerequisites** *(ERP parameter configuration/settings)* |
| 1. | Enter company name, contact, phone, and email address. |
| 2. | Enter company name, contact, phone, and email address. |
| 3. | Enter company name, contact, phone, and email address. |
| **7. Other information provided by the organization** |
| 1. | Enter company name, contact, phone, and email address. |
| 2. | Enter company name, contact, phone, and email address. |
| 3. | Enter company name, contact, phone, and email address. |

**Definitions:**

**Deployment complexity:**

A. No setup (potentially a **hosted**solution) provides services to customers who do not have to install or maintain the software or hardware. Hosted solutions have no setup requirements for end users; however, installing and configuring a hosted solution can be extremely complex, and the test vendor may not have the hardware, custom software, or services that the solution requires.

B. **Simple**setup is one that the test vendor can install and configure through Sage ERP X3

 patching tools.

C. **Complex** setup is one that the test vendor cannot completely replicate; for example, solutions that require specific hardware, custom software, or back-end services that the vendor cannot duplicate.

**Development technology:**

A. An **embedded** or in-product solution is fully developed in Sage ERP X3 by using only the tools provided with the SAFE X3 platform.

B. **Connected** solutions use SAFE X3 Web Services, the Java Bridge Server Component, or import/export to integrate with Sage ERP X3.

C. **Multiple** solutions have components developed within Sage ERP X3 using SAFE X3 and extend or connect to Sage ERP X3 using other third-party technologies.