Customer Service and Support

Baan Product Maintenance Policy

Table of contents

About this document

This document describes the Baan maintenance policy of released products. The Baan maintenance policy is a generic product independent maintenance standard.

The primary target audiences of this document are the customers and alliances of Baan. The Baan maintenance policy provides them with the required information on which they can base their own, internal automation system related (maintenance) policies.

The secondary target audience of this document is the Baan organization itself. The document can be used by the Baan organization to establish and sustain consistency in maintenance practices.

This document consists of the following chapters:

- Chapter 1, "Abstract," provides a summary of the Baan Product Maintenance Policy. It provides high-level overviews of the Maintenance Practices applied by Baan CS&S. Details are worked out in the subsequent chapters.

- Chapter 2, "Introduction," provides an introduction to the Baan Product Maintenance Policy.

- Chapter 3, "Terminology and references," gives an enumeration and explanation of terms frequently used in the document. It also gives an overview of the references that were used.

- Chapter 4, "Maintenance scope," describes the borders of the maintenance activities and introduces the Maintenance Profile.

- Chapter 5, "Product life cycle," describes the life cycle of Baan products after they are made available to customers.

- Chapter 6, "Delivery types," describes the various forms of software deliverables and standards that Baan applies during the maintenance stage of a product.

- Chapter 7, "Delivery types related subjects," describes various other subjects that are closely related to the delivery types described in the preceding chapter.

- Chapter 8, "Communication," describes how customers are being informed about availability of maintenance deliverables and other issues.

1   Abstract

New products are being released in the form of major versions and minor versions. In the Baan organization, Baan Development is responsible for the development of new products. After a product is made available to the market, Baan CS&S becomes responsible for the support and maintenance of these products.

During the maintenance phase of a product, Baan CS&S only applies corrective maintenance. Reported defects are being solved. No functional changes or new functionality is being implemented. Only in the case of exceptional situations, for example, changed legal requirements, Baan CS&S will deviate from this policy.

The life cycle during the maintenance phase of a product has two stages:

- Standard support.
- Limited support.

The duration of each stage is determined by Baan CS&S. Each stage has its own characteristics regarding the extend of maintenance, availability of solutions, availability of translations, and so on. After the limited support stage the support and maintenance on the concerning product stops.

Solutions prepared by Baan CS&S is made available to customers. Baan CS&S applies three forms of software updates (or delivery types):

- Individual solutions.
- Collections.
- Service Packs.

An individual solution contains a fix for a particular defect. Collections and Service Packs are a bundling of a number of individual solutions. Each product determines which delivery types are being applied. The delivery types have following pre-defined characteristics:

- Frequency of publication.
- Composition of the update.
- Naming of the update.
- Language availability.
- Distribution mechanism.
- Documentation.

Changes are marked and documented in the software in such a way that the upgrade of customizations for example, can be performed efficiently.

Source code of the updates is made available to customers who have a source code license. The way in which source code is made available can differ per product. Source code for Baan intellectual property areas, is not distributed.

Individual solutions and collections are only made available in a limited number of pre-defined, A-Languages. Translation to the B-languages is only performed for Service Packs.

Solutions for the standard product and products that are derived from the standard product, for example, extensions and localizations, are made available simultaneously.

The scheduled availability of the various delivery types is communicated to customers. Alternatively, there is also an infrastructure to make visible what is already available and to communicate urgent subjects to the customer.

For each individual product the information previously described is combined and visualized in a Maintenance Profile. The Maintenance Profiles are also published and can be investigated by the customer.

2   Introduction

The Baan product suite is growing continuously. A stream of product enhancements is released in the form of major versions, minor versions, and service packs. When a new Baan product is released to the market, it can be a major product version or a minor product version depending on the functionality that is added to the product. A major product version is created when new technologies or major functional enhancements are added to the product. All other functional improvements are released as minor product versions.

Baan Development (BD) is responsible for the development of the major versions and minor versions in Baan. After a new product has been finalized and released, the responsibility and ownership of the product is transferred step-by-step to the Baan Customer Service and Support (Baan CS&S) department. The transfer of new products from BD to Baan CS&S is performed by means of an extended release readiness process. Knowledge transfer and preparation for organizational readiness are important parts of this release readiness process.

Baan CS&S is responsible for the first, second, and third line support activities. In the first and second line support, customer questions and problems are being handled without modifying the concerning software. When the first and/or second line support is not able to define a good solution to a customer's problem, and when it is likely that the software has to be changed in order to solve the customer's problem, the problem is transferred to third line support. If necessary, third line support will change the released software and perform the required corrections. In Baan CS&S, the Baan Global Support (BGS) department is responsible for first and second line support activities. The Product Engineering Group (PEG) is responsible for the third line support activities.

Solutions created by third line support are published as individual solutions on the Baan Global Support Website. Those customers who are interested can collect and install them. Periodically, all solutions are collected and combined into service packs. Customers can obtain and install these service packs to upgrade their environments.
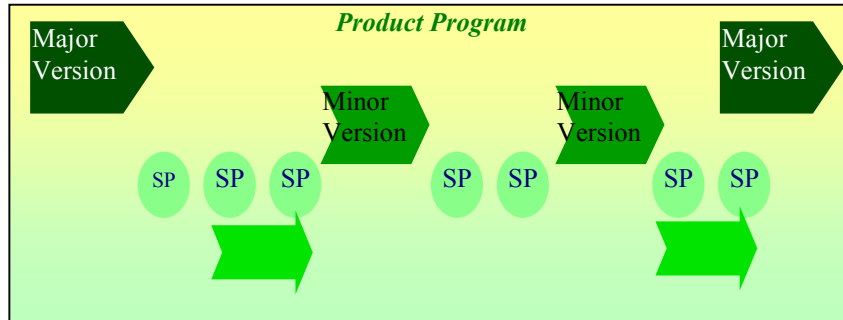
This document focuses mainly on the release process of solutions created by the third line support. It gives an insight to the deliverables that are made available to customers, the frequency in which they are made available, and the form in which they are made available, and so on.

The emphasis of this document is on the maintenance policy of released products. It gives a description of what types of updates are published, when they are published, and how they are published. This document does not deal with the release policy and naming of new products. Baan Development is responsible for the release policy and naming of new products. Referring to the picture above, this document only deals with the SP-bulbs.

This document is merely product-related. So it does not deal with service related issues such as defect priorities, solution lead times, service contracts and so on.

3 Terminology and references

Terminology

Baan Development (BD):	The worldwide organization responsible for the development of the Baan products.
Baan Global Support (BGS):	The organizational entity responsible for the first and second line support in Baan Customer Service and Support.
Baan Support System (BSS):	The automated system used by Baan Customer Service and Support to exchange support information with Baan customers.
Customer Service and Support (CS&S):	The worldwide organization responsible for the maintenance and support of Baan products.
Product Maintenance Control (PMC):	A Baan-tool to install solutions and to manage dependencies between solutions onto a Baan 4GL installation.
Product Engineering Group (PEG):	The organizational entity responsible for the third line support in Baan Customer Service and Support.
Service Pack (SP):	A collection of solutions.
Defect:	Probable mismatch between expected and actual behaviour of software.
Solution:	A fix of mismatch between expected and actual behavior of software.
A-language:	A limited number of languages that is considered by Baan as being of extremely high strategic importance.
B-language:	A limited number of languages that is considered by Baan as being of high strategic importance.
Product Advisory Report (PAR):	A Baan-medium to communicate important product and service related issues to customers.
Maintenance Policy:	A generic, not-product-related manifest describing the way Baan CS&S is performing product maintenance.
Maintenance Profile:	The actual implementation of the Maintenance Policy for a particular product.

Pro-active maintenance:	The form of maintenance in which solutions that are created in a particular product version are also ported pro-actively to predecessors, successors and/or related products of that version.
Re-active maintenance:	The opposite of pro-active maintenance. On a certain product version only solutions are created for defects that are reported for that version. Solutions are not ported pro-actively from other versions.
Software Configuration Management:	The set of tools and procedures to record changes and dependencies between changes in a software environment.
Localization:	From a standard application derived piece of software that is meant to fulfill legal requirements that are applicable in certain countries.
Extension:	From a standard application derived piece of software that is meant to fulfill the business needs of certain lines of business.

4   Maintenance scope

Scope definition

After a product is released, it goes into the maintenance stage of the life cycle. During the maintenance stage, changes, mainly of a corrective nature, are carried out on the product. Software defects that are reported internally, by customers or alliances, are solved.

It is the formal PEG policy to keep a released product unchanged from a functional and data model point of view. This means that no new functionality will be implemented, existing functionality will remain unchanged, and the data model is kept unchanged. Only corrective maintenance activities are performed.

There can however, be exceptional situations under which it is necessary to deviate from this policy. This is performed in a controlled way. Some situations for example, are as follows:

- New or changed legal requirements.
- Very high priority defects that cannot be solved in any other way than changing the data model. The impact of the data model change seems to be limited for the existing installed base.

Scope explanation

There are various reasons why Baan CS&S have limits to corrective maintenance and rarely implement functional changes during the maintenance stage of a product. The main reasons are as follows:

- **Additional training effort**
  Introduction of changed and/or new functionality, but also the introduction of data model changes, might raise the need of additional end-user training. Customers have to train their end-users and make them aware of the changes. They will also have to teach them how to apply and use these changes in their daily business. In general, this implies additional, unexpected costs for customers.

- **Increased customization upgrade effort**
  Customers must upgrade their customizations at the time they install individual solutions or a service pack. Customizations have to match with the standard product both from a technical and functional point of view. Addition of new functionality or changes in the existing functionality will increase the effort and costs to upgrade customizations.

- **Reconfiguration lead-time**
  Changes in the underlying datamodel often result in a reconfiguration of the table. In general, the system is not available for the end-users during a table reconfiguration. In operational environments this can result in unacceptable situations.

- **Unexpected appearance**
  In general, solutions are not stand-alone. Dependencies usually exist between various solutions. This means that installing an individual solution without installing the related solutions is risky or even impossible. Software configuration management tools manage the relationships and dependencies between solutions. Due to these dependencies it is possible that, together with the solution the customer actually wants to install, other related solutions also have to be installed. The other solutions might contain functional and datamodel changes.

- **Increasing data migration complexity**
  In general, Baan provides conversion software between the various software versions that were released in the past. Changing the data model can have impact on the conversion software. Suppose there are a version 1.0 and a version 2.0 for a certain product. In this case there is only one migration path. Then a service pack is created for each version and both service packs contain (different) data model changes. In this case, the number of possible migration paths will explode to four.

- **Commercial aspects**
  Commercial aspects mainly play a role when existing functionality is replaced by another piece of functionality. In this situation, the question always arises whether the old implementation must also be supported and maintained. If customers have to pay extra for the new implementation, then either the old implementation still has to be maintained or the new implementation must be distributed using special commercial tariffs.

- **Limited number of interested customers**
  Often one or a limited group of customers raises the need for a certain functional enhancement. Although the enhancement request might look generic from a product point of view, the enhancement should not be implemented. The limited group of customers that raised the need for the enhancement will benefit. However, the majority of the installed base will have no benefit (and maybe even suffer) due to the factors enumerated before.

- **Porting to future versions**
  Baan strives to have all functionality that was available in an older version of a product to also be present in newer versions. This means that changes implemented in released products, also have to be implemented in products that are still under development. This kind of issue can disturb the schedule of BD significantly and slow down the release of new products.

- **Incompatibility risks in integrated products**
  The Baan product suite consists of a number of well-integrated components. In addition, it is possible to integrate the Baan product to external applications by means of products such as Baan Open World. When performing functional or data model changes, their is a high chance that integrations between the various Baan products and/or external products, will no longer work.

In the very rare cases when Baan CS&S decides to add new functionality or to change existing functionality; an extended impact analysis is always performed in advance. In the impact analysis, the proposed change or enhancement is matched against the eight factors previously described.

Functional changes are documented and communicated clearly.

The Baan Requirements Database

As previously described, Baan CS&S is very restrictive in changing existing functionality or adding new functionality. This does not mean that Baan completely disregards enhancement requests of customers. Customer feedback in the form of enhancement requests is essential for the Baan organization. Enhancement requests are evaluated by Baan CS&S and Baan Development. Useful enhancement requests are stored in the Baan Requirements Database. Baan Development reviews the Baan Requirements Database during the development of new products or the development of successors of existing products.

Introduction to Maintenance Profiles

The previous paragraphs described how the maintenance activities are scoped from a product-functional point of view. The next chapters describe in detail, how maintenance activities are scoped from the life cycle, delivery, and technical points of view. There are various factors that impact the way in which Baan CS&S maintains and delivers products. These factors are, among other things, the current stage of the products life cycle, the technical architecture of the product, the nature and size of the installed base and so on. Per product these factors can vary. As a consequence, each product can have a different maintenance policy.

In order to visualize the maintenance policy, Baan CS&S introduced the Maintenance Profile. Each product has its own Maintenance Profile. The Maintenance Profile contains a summarized overview of all maintenance-related aspects for the concerning product. The maintenance profiles are published on the Baan Global Support Web site. Each Maintenance Profile consists of a number of Maintenance Profile Properties that together determine the maintenance policy. The Maintenance Profile Properties are described in more detail in the subsequent chapters. Appendices A and B are examples of (fictitious) Maintenance Profiles.

A Maintenance Profile is defined before the maintenance stage of a product starts. A Maintenance Profile is not a static, once-only defined document. During the life cycle of a product, the Maintenance Profile can be subject to changes. After every change a new revision of the Maintenance Profile is created. The most recent revision reflects the actual maintenance policy of the product; the older revisions are historic versions. All revisions of a Maintenance Profile are visible on the above-mentioned Internet site. Baan CS&S announce changes in a maintenance profile timely.

5   Product life cycle

Introduction

Every product has a life cycle. Software products released by Baan have a well-defined life cycle. After new products are released, they enter the maintenance phase. The maintenance phase consists of the following stages:

- Standard support.
- Restricted support.

The following paragraphs describe the various stages and their characteristics. At the end of the Standard Support stage, but at latest the beginning of the Restricted Support stage, the customer should plan for a migration path. This is because, after a product has passed the Restricted Support stage, Baan no longer provides support for the product concerned. Customers are expected to migrate to newer versions of the Baan product or to arrange support by means of other partners. Customers will be informed about the end-dates of the two stages.

Before the Restricted Support phase starts, Baan will provide a logic migration path and will also take care of the availability of migration tools.

The duration of the various stages of the life cycle can differ per product. The duration depends on a number of aspects such as:

- **Duration of implementation**
  In general, the longer it takes to implement a certain product, the longer the various stages of the life cycle will be. For example, the implementation of an ERP application can take up to a year, whereas the implementation of an E-Enterprise application takes significantly less time. This implies that the ERP application must be supported relatively longer than the E-Enterprise application.

- **Ease of migration**
  In general, the easier, and cheaper, it is to migrate from one product version to its successor, the shorter the various stages of the product life cycle will be.

- **Customer investments**
  The higher the customer's investment for a new version of a certain product, the longer the various stages in the product life cycle will be. If customers have to invest a lot of money in the new version of a product, the higher the barrier will be to migrate to the newer product.

- **Commercial interests**
  Baan's commercial interests also play a role. If for example, the sales volumes for a product exceed forecasts, it can result in prolongation of the various stages in the life cycle.

- **Release frequency of new products by Baan Development**
  The higher the release frequency of new products by Baan Development, the shorter the various stages of the product life cycle will be. This enables the product range being maintained by the Baan CS&S organization, limited and manageable. In practice, the release frequency of new products by Baan Development is also influenced by the aspects a, b, c and d.

- **Full availability of the new version**
  New products have to be translated to various languages, ported to various hardware platforms, databases and so on. This is a time consuming process. The life cycle of a predecessor can be impacted if the successor is not yet available for all languages, hardware platforms, databases and so on.

Standard support

Software in the Standard Support stage is given standard support as detailed in the Baan Software License & Support Agreement (SLSA). From a maintenance point of view, the Standard Support stage has the following characteristics:

- Re-active maintenance, and most probably pro-active maintenance, is always being performed. A product is subject to re-active maintenance, if problems solved are only reported for that particular version. Pro-active maintenance means that solutions are not created only in the version for which the defect is reported. The solution will also be ported to predecessors, successors and/or derived products in which the same defect may exist. During the Standard Support stage Baan CS&S can decide to stop pro-active maintenance.

- Service packs are released according to the frequency defined in the Maintenance Profile.

- Solutions are only created and made available on the latest available Service Pack. Back porting to older service packs is not performed. Therefore, it is in the customer's interest to upgrade to the latest service packs as often as possible.

- The Standard Support stage lasts for a pre-defined number of years. After this period, Baan decides once a year if the Standard Support is prolonged or not. The length of the Standard Support stage is included in the Maintenance Profile.

- In principle, no functional changes or additions are allowed. Exceptions are new/changed legal requirements. For more details refer to Chapter 3, "Terminology and references."

Restricted support

In specific circumstances, Baan may extend the current support period with a period called Restricted Support stage. The decision is based on the number of customers still using the product. From a maintenance point of view, the Restricted Support stage has the following characteristics:

- Only re-active maintenance is being performed.

- Only high priority defects, categories 10 and 20, are taken into account.

- No more service packs are released, and B-language translations are no longer created.

- Solutions are only created and made available on the latest available Service Pack. Back porting to older service packs is not performed.

- No functional changes or additions are allowed. Functionality for new/legal requirements is also not implemented.

Beta program and limited availability

Although it is not an official stage of the Baan CS&S product life cycle, the terms beta program and limited (or restricted) availability, are also used in Baan. Both terms mean that a product is made available to a limited, selected number of customers. Baan evaluates each and every order request. The following terms are explained in more detail:

- The beta program is meant to involve customers in an early stage in the development process and to validate the usability of new products. In general, this is performed under supervision of BD. Direct agreements are usually made between BD and the selected customer about the maintenance policy to be followed. This means that Baan usually applies re-active and pro-active maintenance. Baan may perform (substantial) functional and technical changes in the product. The customer must be careful in creating customizations, as customers are not supposed to use the product in an operational environment. Individual solutions are only made available on special request, and the customer is supposed to install the definite, general available product as soon as it is available.

- Limited availability occurs when the product is available as a finished generic product, but the internal Baan CS&S organization is not yet fully prepared to support the product. In this situation Baan applies re-active and pro-active maintenance.

6 Delivery types

Introduction

Baan CS&S applies three forms of software updates that are made available to the customer:

- Individual solutions.
- Collections.
- Service packs.

There is a hierarchical relationship between these three delivery types. The following paragraphs describe the delivery types in more detail.

Baan has various products in its assortment. The majority of the Baan software is still written in Baan 4GL, but more products are coming up with different underlying technologies. Among other things, the underlying technology determines if all delivery types are feasible or not. As a consequence of this, not all delivery types are available for all products. For example, individual solutions are not made if it is difficult or impossible to extract a subset of components from a software environment. Another example is if it is very time consuming and costly to compose a certain delivery type.

Individual solutions

Description

An individual solution is a piece of software that contains the solution to, in general one defect. Occasionally, it might be the case that it contains the solution to more than one defect, but the number is always limited. These are exceptions and are documented in the proper way in the corresponding solution description.

The goal of publishing individual solutions is offering the customer the possibility to solve problems in a corrective way.

Individual solutions are tested one by one and quality checks are performed for every individual solution.

Frequency

Individual solutions are published as soon as they have passed the whole internal Baan maintenance process. The publishing of individual solutions is an ongoing process.

Composition

Individual solutions can contain either, only the changed components or the full product again, depending on the underlying tooling. Due to the cumulative nature of software, the components of an individual solution also contain all preceding solutions made for that component.

Naming Convention

Every individual solution dump is named in a clear, unique, and recognizable way. The solution number is part of the naming convention of the individual solution. If a solution is implemented in multiple versions, there is one solution number and multiple solution dumps. For each version there is a separate solution dump. Therefore, the software packages have the version number included in it.

A solution dump is named as follows by default:

- <Product><Major number><Minor number>[<Minor sublevel>]_<solution number>[<extension>]

Example:

- B50b_984567stnd

REMARK   Small deviations from this coding standard are possible. Separators other than underscores are sometimes used, for example, dots. It is also possible that the separators are not present at all. The latter is the case if the length of the code exceeds the maximum possible length for file names; that is 16 characters on the UNIX hardware platform. The maintenance profile contains an explanation of the used coding standard.

Language availability

Individual solutions are always available in the source language US-English. In addition, Baan will publish individual solutions in a limited number of other languages, the A-languages. Baan CS&S will not provide B-language translations of individual solutions. Taking into account the current available technologies, it is not yet feasible to publish individual solutions for the B-languages. This is due to the expected lead-time, complexity, and overhead.

REMARK   Language availability only plays a role if a solution contains language dependant components. Experience shows that the majority of solutions do not contain language dependant components. If a customer wants or needs to install an individual solution in a not-available language, then the customer should contact the local Baan office or Baan alliance and determine an approach. If the customer has the skills required, the translation can of course be performed in-house.

Distribution

Individual solutions are published on the Baan Global Support Web site. Customers can download and install them when required.

Documentation

Documentation belongs to each individual solution. This documentation is created in a fixed format. Customers can view the documentation, or solution text, by means of the Baan Global Support Web site. The documentation is linked to the solution number.

Collections

Description

Collections consist of a number of individual solutions. Periodically, a number of individual solutions are combined into a software package, the collection.

The goal of publishing collections is partly corrective and partly pro-active. Particular customer problems are corrected other problems are prevented.

No additional testing or quality checks are being performed for collections.

Frequency

The frequency of collections is based on one of the following mechanisms:

- Time based:
  This methodology uses fixed intervals for example, every week.

- Contents based:
  A collection is composed after X (business critical) solutions are created.

A time-based mechanism is the usual approach for maintenance intensive products with many solutions. The disadvantage of the contents based approach is that it is rather unpredictable when a collection becomes available.

Composition

Because a collection consists of a set of individual solutions, the composition is the same as the composition of individual solutions.

Naming Convention

Every collection dump is named in a clear, unique, and recognizable way. A collection is identified as follows:

- <Product><Major number><Minor number><Minor sublevel>_<collection identifier>[<extension>]

Example:

- B50b_wk0045stnd

If the frequency is time based, a period number for example, week number, will be put in the collection identifier. If the frequency is contents based, the collection identifier will be a simple sequence number.

REMARK   Small deviations from this coding standard are possible. The maintenance profile contains an overview of the used coding standard.

Language availability

Similar to language availability of individual solutions.

Distribution

Collections are published on the Baan Global Support Web site. Customers can download and install them when required. If a Service Pack is distributed by means of CD and/or tape, Baan also strives to put the available newer collections that are not part of the Service pack, on the service pack medium.

Documentation

The documentation of a collection consists of a document that contains an enumeration of all the individual solution numbers included in that collection. The document is linked to a BSS solution. In BSS there is an option to get an overview of all available collections. In addition, the BSS solution numbers to which the collection documentation is linked is stored in the maintenance profile. Note that the full solution descriptions, of all the individual solutions, are not visible in the collection documentation. The full text can be viewed by navigating in BSS to the concerning individual solution numbers.

Service Packs

Description

A service pack also consists of a number of individual solutions. From that point of view it does not differ significantly from a collection. The main difference between collections and service packs is the fact that service packs are subject to an additional test cycle. In addition, the number of individual solutions in a service pack is in general much higher compared to a collection. Finally, service packs will be translated to the B-languages.

Service packs have a corrective, but mainly pro-active goal. Particular customer problems can be corrected other problems can be prevented.

Before a service pack is being published, an extended additional test phase is being passed. During this additional test phase, the emphasis lies on the integral functioning of the application.

Frequency

The frequency of service packs is determined in one of the following ways:

- Time based:
  This methodology uses fixed intervals for example, every four months.

- Contents based:
  A service pack is composed after X (business critical) solutions are created.

A time-based mechanism is the usual approach for maintenance intensive products with many solutions. The disadvantage of the contents based approach is that it is rather unpredictable when a collection becomes available.

Composition

A service pack is composed in one of the following ways, each alternative has its (dis)advantages:

- Delta:
  When using this composition method, the service pack only contains the changes that were implemented during the build period of the concerning service pack.

- Cumulative:
  When using this composition method, the service pack does not only contain changes of the concerning service pack, but also all changes of the preceding service packs.

- Full product:
  When using this composition method, the full product is delivered again. This means that not only components are included that were changed during the maintenance stage, but also the components that were never changed during the maintenance stage are included.

The composition method of service packs can change during the life cycle of a product. It can be the case that in the early stage of the lifecycle, the cumulative composition is used relative few customers, relative few customizations, ease of installation for new customers. Subsequently, the delta composition can be applied.

REMARKS From a customization point of view, the delta-composition is the preferred composition method. A service pack only contains changes implemented during the build period of that service pack. Therefore, changed components are very well isolated and customizations can be updated easily.

From an ease-of-installation point of view, a cumulative, or full product composition is the preferred composition method, especially for new installations. In this case, you do not have to install a range of consecutive service packs but just one product. Either the full product composition, or the base product and the cumulative service pack, cumulative composition. Alternatively, the delta composition is the preferred composition method for upgrading existing installations. The delta composition results in a relative short installation lead-time.

Naming Convention

Service packs are named as follows by default:

- sp<Product><Major number><Minor number><Minor sublevel>_ <service pack number>[<extension>]

Example:

- spB50b_6stnd

Small deviations from this coding standard are possible. The maintenance profile contains an explanation of the used coding standard.

Language availability

Service packs are made available for all languages in which the underlying base product was also made available. In general, there is a time difference between the availability of a service pack in the A-languages and the availability of a service pack in one of the B-languages. Baan strives to have all the translations of a service pack available within three months after the A-languages version was published.

Distribution

Two distribution mechanisms are possible for Service packs:

- Distribution by means of conventional media such as CD and tape.
- Distribution by means of the Internet.

The size of the service pack determines which distribution mechanism is chosen. For high volume service packs, the conventional media option such as CD and tape is recommended. Small volume service packs can be distributed by means of the Internet. At the time of composing this document a limit of approximately 15 Mega Bytes is used.

When Baan chooses a certain distribution mechanism, Baan strives to keep the same distribution mechanism for all service packs of that product as much as possible.

Documentation

Service packs are released with a full set of documentation. The documentation of a service pack consists of the following elements:

- Enumeration of solution numbers excluding solution texts.
- Enumeration of solution numbers including solution texts.
- Enumeration of all modified software components.
- Installation guide.

The installation guide briefly covers the following issues:

- Content description of the related medium:
  The content description describes the files that are included in the medium. It also describes which languages and operating systems apply to the service pack.

- Pre-requisites:
  The pre-requisite describes the conditions that have to be fulfilled before the service pack can be installed.

- Dependency matrix:
  The dependency matrix describes which versions of other products the application can be used with.

- Instructions about how to install the service pack:
  The instructions also contain sizing information. The sizing information gives an indication of the size of the service pack and the disk space that is required to install the service pack.

- A short description of functional enhancements, if present, in the service pack.

- A reference to a BSS solution number where important information can be found that might arise after a service pack has been released.

- A reference to BSS solution number where important information can be found concerning availability of translation of the service pack to B-languages.

7 Delivery types related subjects

Source code

Source code is required to develop and maintain, for example, customizations. Some source code is considered to be Baan intellectual property. Examples of this are the Baan 4GL tools engine, the bshell and so on. Source code for this type of component is not distributed to customers and alliances. However, the majority of the source code is, under certain conditions, available to customers and alliances.

At the first release of a product, BD, in cooperation with the Product Marketing department, decides whether to make the source code available to customers and Baan alliances. Initially, the sources are distributed by means of source CD's. A source code license is required for ordering a source CD.

With regard to source code, Baan CS&S follows the initial policy that was defined by BD. This means that no source code is provided for solutions that are created in areas that Baan considers being intellectual property. For the other areas, source code is provided together with the solution. This way, customers will be able to upgrade their customization. The following mechanisms are possible to distribute source code that belong to a solution:

- Integrated in the solution dump:
  This mechanism is used if the installation software prevents the installation of the source code when the customer has no source code license. In this case the source code is included in an encrypted way that makes it undecipherable.

- As separate dump:
  This mechanism is used if the installation software has no mechanisms to prevent installation when the customer has no source code license. This mechanism is also applied if it is possible to manually extract the source code in a legible format from an integrated solution dump.

The maintenance profile indicates if source code is distributed and in what form the source code is distributed.

Change traceability

Baan CS&S marks and documents all changes performed in the software in such a way that customers are able to upgrade their customizations in a quick and efficient way. However, due to technical limitations this is at the moment not possible for all component types.

Translations

As explained earlier, Baan CS&S only provides individual solutions and collections in a pre-defined number of languages. These are the A-languages. Translations for the remaining B-languages are only performed on Service Pack level[1]. Baan CS&S strives to have the translations available within three months after the release of the service pack. The translations are distributed as translation patches that need to be installed on top of the regular service packs. Depending on the size, the translations are distributed by means of Internet or CD. If distribution is performed by means of Internet, the translations are linked to a BSS solution number. You can find the BSS solution number in the maintenance profile.

Translation patches are identified in the following way:

- <Product><Major number>.<Minor number><Minor sublevel>sp<service pack number>-<Language(s)>

Example:

- BaanERP5.0bsp6-5

[1] For future products, Baan will no longer use the A and B languages concept. As a replacement, the default/not-default language concept will be introduced. The default languages are:

- US-English.
- Dutch.
- German.
- French.
- Spanish.
- Italian.
- Japanese.

All other languages are not-default languages. New products will always be made available for the default languages (until there is a valid reason to deviate from this policy). Translation to not-default languages is only performed if a business case arises. When composing this document, it was not yet known what the consequences of this would be for future maintenance policies. Baan uses an internal coding standard for identifying the various languages. Appendix C gives the overview.

Derived products

Various products are derived from certain base products. Examples for this are Localizations and Extensions. Localizations and extensions are derived from a base product and can, in general, only work together with the base product. Baan CS&S make solutions and its derivatives for the base products available at the same time. This applies to solutions, collections, service packs and translations of service packs. The maintenance profile of the base product enumerates for which derived products Baan CS&S has the maintenance responsibility.

Version control

A number of the Baan products have facilities to do version management at the customers system. This means that strict version control is applied. New components cannot be installed unless related predecessors are installed. Version control tools also prevent the more recent components at a customer's system being overwritten by older components. An example is the PMC-tool that is available for software that is developed with the Baan-4GL tools.

Not all Baan products have these facilities included. When a product does not have these facilities, this can be a reason not to deliver individual solutions or collections, but only service packs.

If no version management facilities are included, it is the customer's responsibility to have an administration of what additional solutions or collections have been installed. This administration is required in order to prevent during installation of a service pack, the more recent solutions being overwritten that were not yet part of the service pack.

In the long term, Baan strives to have all products under version control. In the maintenance profile you can see whether a product is under version control or not.

Solutions and i-Packs

The term Solution in this paragraph has a different meaning compared to the remainder of this document. Baan has solutions in the assortment. In the context of this paragraph, a solution is a set of products that are integrated and linked to each other by means of i-Packs. Solutions are bundled and offered as one commercial product to the market. An example of a solution is iBaan Sales in which among other things the products iBaan ERP5, iBaan E-Sales and iBaan SalesPlus are bundled. This solution will cover the full business needs from front office to back office of the sales function in a company.

Baan CS&S will not provide updates on solution-level. Maintenance policies are defined on the level of the constituting products. This means for example, that the frequency of publication of Service Packs can be different for all the constituting products of a solution. Baan CS&S will of course take care that the compatibility between the constituting products of a solution remains guaranteed.

i-Packs are individual commercial products that can link and integrate various applications together. In general, an i-Pack will be one of the constituting components of a solution. A certain i-Pack that integrates products A and B would in general, contain the following categories of components:

1   Adapter components that plug into product A
2   Adapter components that plug into product B.
3   Middleware components.

Category-1 components follow the maintenance policy of product A. Catergory-2 components follow the maintenance policy of product B. Category-3 components follow a separate maintenance policy. The i-Pack has one maintenance profile describing the maintenance policy for the three categories of components.

8 Communication

Introduction

This chapter describes the communication between Baan CS&S and the customer, regarding product-related issues. The chapter contains an overview of what is being communicated and how issues are communicated. Due to progressing communication technologies, the latter might be subject to changes.

Apart from the communication channels described in this chapter, the oral communication through for example, Support Analysts plays an important role.

What is scheduled

The planned availability of Individual Solutions is stored in BSS. Each defect has a Planned Solution Date (PSD) linked to it. The defect should be solved before or on the PSD. When no PSD is available for a defect, it means that the concerning solution is not scheduled in PEG. Scheduling is performed, based on priorities (weight factors) of defects. Customers can investigate PSDs by means of the Baan Global Support Web site.

The planned availability of Collections can be found in the Maintenance Profile. Based on the collection frequency and the last collection time, the customer is able to determine what the next release date for a particular Collection will be.

For Service Packs, the scheduling is performed according to the frequency that is defined in the Maintenance Profile. In general, the planning horizon for service packs is at least one year. Scheduled service packs are also visible in the Maintenance Profile.

What is already available or becomes available now?

The availability of Individual Solutions can be investigated on the Baan Global Support Web site www.support.baan.com. In addition to this, the Baan Knowledge Base offers good facilities to find a solution for the particular problem a customer is facing. The Knowledge Base is accessible through the Baan Global Support Web site.

The same applies to the availability of Collections. In the Maintenance Profile a link is made to a BSS solution. Collection information and documentation can be found in this BSS solution. In addition to this, the Baan Knowledge Base provides a separate entry pointing to all BSS solutions that are linked to collections.

After Service Packs have passed the internal processing and are made available to the market, the availability is mainly communicated to customers and alliances by means of the following channels:

- An updated maintenance profile: Each time a Service Pack is made available for a certain product, a new revision of the Maintenance Profile is made. The new revision includes an announcement of the new available Service Pack.

- An announcement made by Baan CS&S by means of the communication medium that is actual at that moment. When composing this document, the Product Advisory Report (PAR) is being used for this.

Urgent issues

If urgent issues are found in released products, individual solutions, collections or service packs, that all customer should be aware of, this is communicated by means of the communication medium that is actual at that moment. When composing this document the monthly Product Advisory Report (PAR) is being used for this. The purpose of the PAR is to identify high priority defects and communicate their solutions or workarounds to Baan customers.

In the near future the PAR might be fully integrated in the Web site of Baan CS&S.

General

Baan CS&S strives to concentrate all types of product and service related information on the Baan Global Support Web site.

Appendix A Maintenance Profile
BaanERP 5.0b (standard)

Product	**: BaanERP 5.0b (standard)**
Revision	**: 21 (Current)**
Revision date	**: 05-05-2001**
Changes	**: Planned release date of SP11 changed**

Standard support start : 17-08-1998

Standard support end : 31-12-2005

Restricted support start : 01-01-2006

Restricted support end : 31-12-2007

Logic successor : BaanERP 5.0c

Derived products : Localizations for BaanERP 5.0b

A-languages : US-English, German, and Dutch.

B-languages : French, Italian, Spanish, Norwegian, Swedish, Finnish, European Portuguese, Korean, Japanese, Traditional Chinese, and Simplified Chinese.

Language dep. Comps. : Forms, reports, labels, sessions, tables, Help topics, messages, questions, (enum)domains, menus, charts, business objects, and sub-function(s).

Individual solutions	: Yes.
Distribution mechanism	: ftp://www.support.baan.com/B50_b
Naming convention	: <Product><Major number><Minor number> <Minor sublevel><solution number>[<extension>] for example, B50b457453stnd.
Composition	: Only changed components.
Source code	: Included in the solution.

Collections	: Yes.
Collection frequency	: Weekly.
Composition day	: Tuesday, before 12:00 CET.
Distribution mechanism	: ftp://www.support.baan.com/B50_b
Naming convention	: <Product><Major number><Minor number><Minor sublevel>.<collection identifier>[<extension>] for example, B50b.wk200113stnd.
Composition	: Only changed components.

Service Packs	: Yes.
Service Pack frequency	: Every four months.
Distribution mechanism	: CD.
Naming convention	: <Product><Major number>.<Minor number><Minor sublevel>.SP<service pack number> for example, BaanERP5.0b.SP6.

Distribution mechanisms for B-language translations	: ftp://www.support.baan.com/B50b

Version control present	: PMC

Service Packs

SP	Code Freeze Date	Release Date	Solution last minute info	Solution language translation	Solution collections	Composition
SP1	01-10-1998	18-11-1998	n.a.	n.a.	n.a.	Cumulative
SP2	20-11-1998	11-01-1999	n.a.	n.a.	n.a.	Cumulative
SP3	14-01-1999	18-02-1999	n.a.	n.a.	n.a.	Cumulative
SP4	04-03-1999	26-03-1999	n.a.	n.a.	n.a.	Cumulative
SP5	07-05-1999	08-07-1999	n.a.	n.a.	n.a.	Cumulative
SP6	23-07-1999	08-10-1999	n.a.	77279	n.a.	Delta
SP7	04-01-2000	22-02-2000	79839	79838	n.a.	Delta
SP8	01-05-2000	17-07-2000	100980	100979	81364	Delta
SP9	25-09-2000	12-12-2000	104170	104169	101088	Delta
SP10	14-02-2001	26-04-2001	109526	109525	104090	Delta
SP11	25-06-2001	17-08-2001			112104	Delta
SP12	29-10-2001	21-12-2001				Delta
SP13	25-02-2002	26-04-2002				Delta
SP14	24-06-2002	23-08-2002				

Appendix B Maintenance Profile E-Sales 2.0

Product	**: E-Sales 2.0**
Revision	**: 8 (Current)**
Revision date	**: 05-05-2001**
Changes	**: Restricted support stage defined**

--

Standard support start	: 01-01-2000
Standard support end	: 30-06-2001
Restricted support start	: 01-07-2001
Restricted support end	: 30-06-2002
Logic successor	: E-Sales 2.2
Derived products	: Not applicable.

A-languages	: US-English, German, Dutch, and French.
B-languages	: French, Italian, Spanish, Norwegian, Swedish, Finnish, European Portuguese, Korean, Japanese, and Brazilian Portuguese.
Language dep. Comps.	: Language resource file.

Individual solutions	: Yes.
Distribution mechanism	: ftp://www.support.baan.com/updates/E-Enterprise/E-Sales/2.1
Naming Convention	: <Product><Major number><Minor number><Destination SP><sequence letter>[<extension>] for example, E-Sales2.1.3.a.
Composition	: Only changed components included.
Source code	: No. For individual solutions available after a request at Baan CS&S. For Service Packs a separate source CD can be ordered.

Collections	: No.
Collection frequency	: Not applicable.
Composition day	: Not applicable.
Distribution mechanism	: Not applicable.
Naming convention	: Not applicable.
Composition	: Not applicable.

Service Packs	: Yes.
Service Pack frequency	: Variable, depending on number of solutions created. Highest frequency is once a month.
Distribution mechanism	: ftp://www.support.baan.com/updates/E-Enterprise/E-Sales/2.1
Naming convention	: <Product><Major number>.<Minor number>[<Minor sublevel>].SP<service pack number> for example, E-Sales2.1.SP3.

Distribution mechanisms for B-language translation	: not applicable, service packs are language independent.

Version control present	: No.

Service Packs

SP	Code Freeze Date	Release Date	Solution last minute info	Solution language translation	Solution collections	Composition
SP1	04-05-2000	09-05-2000	742638	n.a.	n.a.	Cumulative
SP2	05-10-2000	10-10-2000	323820	n.a.	n.a.	Cumulative
SP3	11-11-2000	16-11-2000	382739	n.a.	n.a.	Cumulative
SP4	11-03-2001	16-03-2001		n.a.	n.a.	Cumulative
SP5				n.a.	n.a.	Cumulative

Appendix C Language codes

Language codes as of September 2000			
Language name	**ERP language code**	**Language codes DLLs**	**MS language codes**
Dutch	1	10	1043
English (US)	2	20	1033
German	3	30	1031
Japanese	j	j0	1041
French	4	40	1036
Spanish	5	50	1034
Italian	6	60	1040
Danish	7	70	1030
Norwegian	8	80	1044
Swedish	9	90	1053
Finnish	f	f0	1035
Portuguese (European)	P	P1	2070
Portuguese (Brazilian)	p	p0	1046
Korean	k	k0	1042
Chinese (simplified)	n	n0	2052
Chinese (traditional)	o	o0	1028
Arabic	a	a0	1025
Bulgarian	b	b0	1026
Catalan	c	c0	1027
Polish	d	d0	1045
Greek	e	e0	1032
Estonian	E	E1	1061
Hebrew	h	h0	1037
Croatian	H	H1	1050

Latvian	L	L0	1062
Hungarian	m	m0	1038
Canadian French	q	q0	3084
Romanian	r	r0	1048
Russian	R	R1	1049
Serbian (cyrillic)	S	S1	3098
Slovenian	s	s0	1060
Czech	t	t0	1029
Turkish	T	T1	1055
Lithuanian	v	v0	1063