sage X3

Lifecycle Policy FAQ

Updated June 2020

Contents

Please note this document may updated periodically so we recommend you check for updates

What is a lifecycle policy?

A lifecycle policy formalizes a software vendors procedure of withdrawing maintenance support for software versions that are behind the latest release.

The Sage X3 lifecycle policy specifies how long maintenance support will be available for a release of Sage X3, from when the product is available for purchase to when it reaches the end of maintenance date.   It is designed to provide consistent and predictable guidelines on maintenance support of Sage X3 versions throughout the life of the product.

Why have a lifecycle policy?

It's standard industry practice for technology companies to withdraw support for older versions of software. Every year we invest in research and development to improve our software and services. We do this in line with regular customer feedback and to take into account new technology and changes in legislation. We believe that using the latest software is the best way for us to help our customers run their business effectively. Plus by concentrating our resources on looking forward, we can help your business move forward too.

What is maintenance support?

Maintenance support covers several areas that are delivered by the Sage X3 development teams and L3 Support.   It can include the delivery of compliance updates for Sage X3 core legislations, new features, enhancements and bug fixes. A customer with an active Sage X3 subscription, or a valid support maintenance contract version of Sage X3 is within a lifecycle stage phase is eligible for maintenance support as outlined in the lifecycle policy. The level of maintenance support delivered will depend on the lifecycle maintenance stage of the version of Sage X3.

Is maintenance support the same as Customer Support plans and contracts?

No, but they are related.   Customer Support plans, and maintenance contracts provide customers with a range of services and tools from helpdesks, online support, knowledge base as well as the ability to take patches, or when necessary receive hotfixes for critical issues.   A customer who has a valid subscription or active support plan is eligible for all the services and tools, including receiving any updates or fixes that would be available depending on the lifecycle stage.   A customer who does not have a valid subscription or active support plan is not eligible for updates or fixes, or to receive any upgrades.

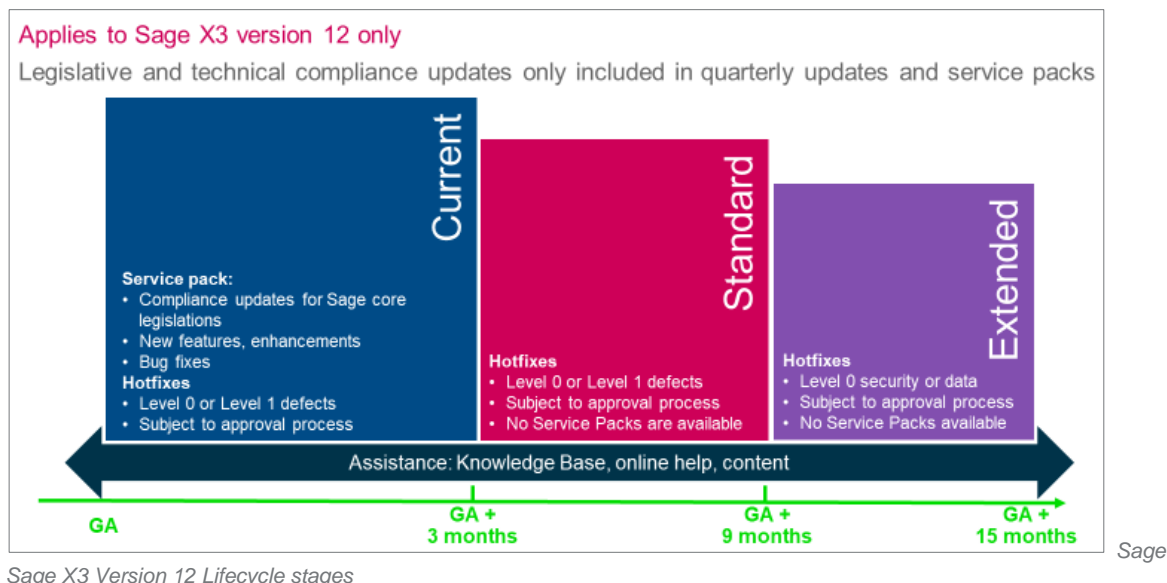### Who has access to the lifecycle policy?

The lifecycle policy is published and available to Sage Colleagues, Sage Business Partners and customers. The Lifecycle policy can be found on Sage City, internally on the Sales Portal, and on the Partner Hub, and Partner Marketing Hub.

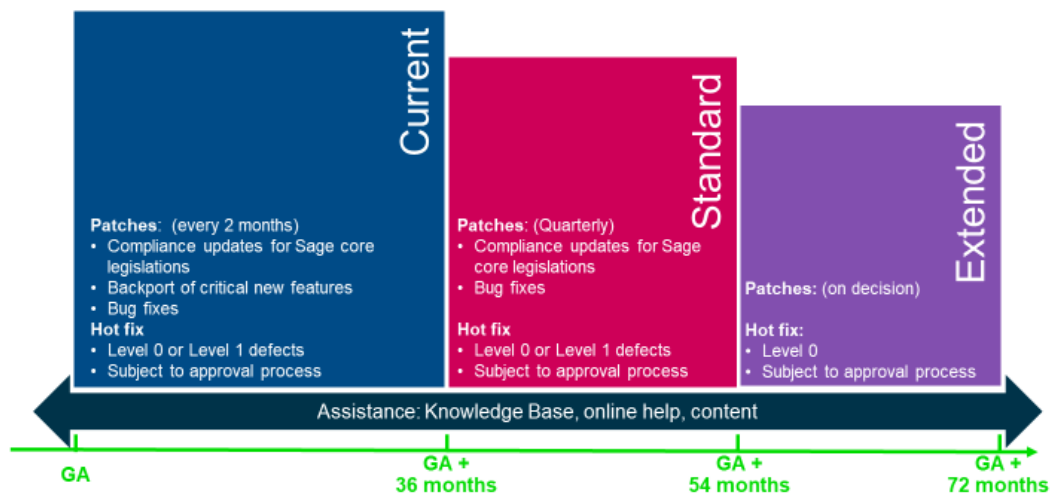### What versions of Sage X3 are covered by the lifecycle policy?

All deployments of any version of Sage X3 is covered by the lifecycle policy apart from Sage X3 multi-tenant customers who are automatically updated.

What are the Sage X3 lifecycle stages?

There are 3 lifecycle stages Current, Standard and Extended.

Applies to Sage X3 version 12 only

Legislative and technical compliance updates only included in quarterly updates and service packs

Current

Standard

Extended

Service pack:
- Compliance updates for Sage core legislations
- New features, enhancements
- Bug fixes

Hotfixes
- Level 0 or Level 1 defects
- Subject to approval process

Hotfixes
- Level 0 or Level 1 defects
- Subject to approval process
- No Service Packs are available

Hotfixes
- Level 0 security or data
- Subject to approval process
- No Service Packs available

Assistance: Knowledge Base, online help, content

GA | GA + 3 months | GA + 9 months | GA + 15 months

Sage

Sage X3 Version 12 Lifecycle stages

Versions 6,7, PU8, PU9, and Version 11 Lifecycle

Current

Standard

Extended

Patches: (every 2 months)
- Compliance updates for Sage core legislations
- Backport of critical new features
- Bug fixes

Hot fix
- Level 0 or Level 1 defects
- Subject to approval process

Patches: (Quarterly)
- Compliance updates for Sage core legislations
- Bug fixes

Hot fix
- Level 0 or Level 1 defects
- Subject to approval process

Patches: (on decision)

Hot fix:
- Level 0
- Subject to approval process

Assistance: Knowledge Base, online help, content

GA | GA + 36 months | GA + 54 months | GA + 72 months

Sage X3 Version 6,7, PU8, PU9, and Version 11 Lifecycle stages

Current is the most robust and complete level of maintenance available for any given version of Sage X3. For Sage X3 version 12 Current commences at the date of general availability (GA) of a Quarterly Update Release, for example 2020 R2. For Sage X3 versions 6,7, PU8, PU9, and Version 11 Current commended at the date of GA of the version.

For Sage X3 Version 12 releases in Current maintenance Sage may deliver:

- A Service pack that may include compliance updates for Sage core legislations, new features, enhancements or bug fixes

- Hotfixes for Severity Level 0 defects, or Severity Level 1 defects

For Sage X3 Versions 6,7, PU8, PU9, and Version 11 releases in current maintenance Sage may deliver:

- A patch list delivered approximately every 3 months that may include compliance updates for Sage core legislations, new features, enhancements or bug fixes

- Hotfixes for Severity Level 0 defects, or Severity Level 1 defects

Standard maintenance stage begins when the Current maintenance stage expires, and ends when the product enters Extended maintenance.

For Sage X3 Version 12 releases that are in Standard maintenance Sage may deliver:

- Hotfixes for Severity Level 0 defects, or Severity Level 1 defects

For Sage X3 Versions 6,7, PU8, PU9, and Version 11 releases that are in Standard Maintenance Sage may deliver:

- Sage core legislation extensions for target markets

- A patch list delivered quarterly that may include compliance updates for Sage core legislations, new features, enhancements or bug fixes

- Hotfixes for Severity Level 0 defects, or Severity Level 1 defects

Extended maintenance begins at the end of the Standard maintenance stage.

For Sage X3 Version 12 releases in Extended Maintenance Sage may deliver:

- Hotfixes for Severity Level 0 defects

For Sage X3 Versions 6,7, PU8, PU9, and Version 11 in Extended Maintenance Sage may deliver:

- Hotfixes for Severity Level 0 defects

- A patch list that may include compliance updates for Sage core legislations, new

What is end of maintenance?

At the end of the 3 lifecycle stages a release of Sage X3 enters reaches **End of maintenance.** Sage will no longer issue patches, updates, bug fixes, Security updates. Sage strongly recommends that you stay current – by accepting available updates within a specific timeframe.

Are there any exceptions to the levels of maintenance support delivered for Sage X3?

No. We strongly recommend that customers apply quarterly updates or patches on a regular basis to ensure that they are on a recent release, and so they can benefit from any compliance updates, bug fixes, or new features.

Why have we made changes with the release of Sage X3 Version 12?

Evolution is normal, the world around us is continually changing – and we see this across the software world with vendors introducing new delivery and lifecycle models to better meet the needs of customers. The days of mega releases hitting the market every 2 years or so with a long shelf life and complicated or almost impossible upgrades is being replaced by a **new normal** – software that has **continuous servicing and support** with quarterly update releases that are driven by customer and market needs and requirements – especially around 2 key areas:

1. **Compliance** – whether technical, security or legislative compliance the speed of change continues to accelerate. It's more important than ever that our customers can be current with the latest technical updates to the platform and its components. That they can confidently mitigate potential security and data risks with timely updates. And of course, ensuring our customers can meet legislative compliance needs for fiscal, regulatory and certification requirements that can change frequently.

2. **Ensuring Customer Success and satisfaction**. With Sage X3 Version 12 we are delivering new features, enhancements, fixes, compliance and legislative changes more frequently, with a smaller delta so our customers can benefit by consuming them more easily. Customers can implement quarterly updates more easily, with less user acceptance testing, and no longer have to apply each patch step by step. Because we have introduced new release management process, automated testing capabilities and cumulative updates.

These changes do require a change in mindset as there is a shortened maintenance support lifecycle for Sage X3 Version 12 quarterly update releases, and customers and partners will need to plan and manage updates more frequently – but there are many benefits to continuous Servicing and support – customers can quickly adopt necessary legislative changes as well as adopt new features and enhancements that will benefit their business processes

Why are the lifecycle stages so much shorter with Version 12?

With the release of Sage X3 Version 12 we have moved to a modern lifecycle model of continuous servicing and support. This includes quarterly update releases which deliver compliance updates following technical, legislative or statutory changes in a timelier fashion for our customers, as well as new features, enhancements and bug fixes. In many ways you can think of a Quarterly Update release as being similar to a patch for older versions of Sage X3 – but with a few differences – Version 12 Quarterly Update releases are now cumulative -this means that a customer no longer has to step through each update individually, but can apply the latest update, with the confidence that all updates in the intervening quarterly update releases will be applied.

Release process: Version 12 vs Version 11

Sage X3 Version 12

2020 R1 — HF — 2020 R2 — HF — 2020 R3 — 2020 R4 — SP — 2021 R1

Sage X3 Version 11

11.0.15 — HF — 11.0.16 — A P — 11.0.17 — HF — 11.0.18 — HF — 11.0.19

Sage X3	Legislative Compliance	Technical Compliance	Security updates	Defect corrections	Pre-set configurations	New features / enhancements	UI Updates	Cumulative
Version 12 *	■	■	■	■	■	■	■	■
Version 11 **	■	■	■	■	■	□	□	
Version 9 **	■			■		□		

* Cumulative patching for Version 12 customers allows a single patch update process
** The latest patch release is not cumulative and every previous patch needs to be installed individually

The Chart above highlights what is delivered in a version 12 Quarterly Update release comparing with Version 11.

How long does it take to apply a Quarterly Update release?

Given that no two customer installations are the same, we cannot give an exact timing, however testing, and experience from Live Services, and some customer feedback indicates that it will take in the region of between 7-10 hours to apply updates. The Cumulative update capability ensures that any updates are applied only once. In addition necessary updates to multiple folders can be applied in a single step.

Why does the defect severity level of a bug matter?

Defect Severity is the classification of a software defect (bug) that indicates the degree of negative impact on the quality of software, and the impact to the customer. The defect severity level is assigned and managed by the Sage X3 L3 team in consultation with customer support and development following established processes.

0 - System down/ Blocker	1 – Business Critical	2 – Major	3 - Minor
Application or Service is not available – Cloud deployments only Data security or data integrity compromised (Virus, malware or other malicious attacks)	Defect causing a customer's business process to be blocked Users cannot complete part or all of the business process using Sage X3 and there is no satisfactory workaround	Defect causing an inconvenience in part of customer's business process, or that causes the business process to be delayed or hindered. Information request or question that requires quick response (critical presales, critical installation…)	Defect that does not cause major business inconvenience or blockage Cosmetic or ergonomic issue

Sage X3 Defect Severity Levels

There are 4 defect severity levels for Sage X3: Hot fixes will only be considered for Severity 0 or Severity 1 bugs depending on the lifecycle stage of the release.

- **Severity 0: System down, blocking**

  - The application or Service is not available - (Applies to Sage X3 Single-tenant and Sage multi-tenant deployments only)

  - Security or data integrity is compromised (harmful viruses, spyware and other malicious software attack) that can compromise company data and information. (Applies to all Sage X3 deployment types)

- **Severity 1: Business Critical** – A defect that causes a business process to be blocked and no workaround has been found that fits the context. For example:

  - Users are not able to complete a business process

  - or business processes managed by Sage X3will not successfully complete.

- **Severity 2**: **Major** – A defect that causes an inconvenience in part of a business process, or causes the business process to be delayed or hindered.

- **Severity 3: Minor** –A defect that does not cause any slowdown or stopping of business processes, is cosmetic or an ergonomic feature.

What lifecycle stages are older versions of X3 in?

The chart below outlines the lifecycle stage for Sage X3 version 11 and earlier. The date indicates when a release enters a lifecycle stage.   For example, Version 11 will move from Current to Standard on 1st July 2020. PU9 will move from extended to End of Maintenance on 1st July 2021.

Version	Current	Standard	Extended	End of Maintenance
Sage X3 Version 11		1 July 2020	3 January 2022	3 April 2023
Sage X3 Version 9				1 July 2021
Sage X3 Version 8				1 July 2020
Sage X3 Version 7				1 July 2020
Sage X3 Version 6				1 July 2020

Sage X3 versions 6,7, PU8, PU9, and Version 11 Lifecycle

What does End of maintenance mean for a customer or a partner?

This does not mean that the software will stop working when a version reaches end of maintenance. It can still be used; however, Sage will withdraw any maintenance support, updates and upgrades in a phased approach. A customer with an active subscription or a valid maintenance contract will still receive support and assistance from their Sage Customer support team, as well as knowledge base, online help and other content.

Can we extend the timeline for a customer?

No, we will not extend the timeline of maintenance support. For customers who are on older versions of Sage X3 we strongly advise that they look to upgrade to the latest release. This will ensure that they are up to date with compliance and security updates, bug fixes, as well as new features. For customers on Sage X3 version 12 it is also important that they regularly apply quarterly update releases for the same reasons of staying up to date with compliance and security updates, bug fixes, as well as new features.   Customers running old versions that are have reached end of maintenance are potentially vulnerable to compliance and security risks.

My Customer is demanding a hotfix, but their version of X3 has reached end of maintenance, can we deliver a fix?

No, We will not provide fixes for versions of Sage X3 that have reached end of maintenance.   Where the issue has been fixed in a later release we will advise the customer that they need to apply the necessary updates to move to the later release.   If the issue still exists in the latest release, we will apply the fix to the latest release.

Who can I contact for more information or support?

Please contact Rebecca.smith@sage.com or your regional Sage X3 Product Marketing Manager or regional Product Manager.