

Certification Progress Report 2020

**Malcolm Woodman,
Oliver Koch**

**M R Woodman Consulting / UK
Linde Engineering / Germany**

Overview

- **Options presented at Annual Meeting 2019**
 - **Funding**
 - **Technical aspects**
- **Feedback from attendees during Annual Meeting 2019**
- **Subsequent developments:**
 - **Change in CO-LaN funding model proposed by Management Board**
 - **CO-LaN software development resource hired**
- **Now ready to proceed to next steps**
- **This presentation will update on the proposals and next steps**

Funding – Options offered in 2019

- 1. CO-LaN Full members fund all costs**
- 2. Charge all Associate Members an annual fee, which includes certification**
- 3. Annual fee for all vendors signing up for certification**
- 4. Charge for test harness software**
- 5. Charge individual vendors for all CO-LaN time spent on certification**

Funding - Feedback

- Nobody wanted Full Members to pay (Option 1)
- Individual Associate members and Academics
 - Signed-up vendors should pay (Option 3)
- Vendors
 - Split across all other options, but primarily:
 - Charge all Associate members an annual fee (Option 2)
 - Signed-up vendors should fund (Option 3)
- End-users
 - Vendors should pay, but no strong preference

Funding – MB Proposal for CO-LaN

- **MB has proposed new funding model for CO-LaN**
 - **All Corporate Associate Members pay an annual fee**
 - **Temporary Investment to Build Up Certification Framework**
 - **Comparable to certification funding Option 2**

Funding - Proposal

	Full Member	Corporate Associate Member	Non-Member
Self-Certification Software	<u>Free of charge</u>	<u>Free of charge</u>	<u>License fee</u> for each new major release One fee for entire Self-Certification Test Suite, irrespective of which interfaces the vendor wishes to test
Request for CO-LaN Contractor to undertake self-certification on behalf of the vendor or end-user	<u>“At cost”</u> Based on hourly rate of CO-LaN Contractor	<u>“At cost”</u> Based on hourly rate of CO-LaN Contractor	<u>“At cost” plus</u> Based on hourly rate of CO-LaN Contractor Ensures non-members contribute to the overall running of CO-LaN
Request for Certificate	<u>Free of charge</u>	<u>Free of charge</u> or <u>“at cost”</u> . “At cost” option only if it is determined that the cost of the certification process to CO-LaN is not insignificant	<u>“At cost” plus</u> Ensures non-members contribute to the overall running of CO-LaN

Funding – Other Comments

- Fees for non-members
 - Should reflect the annual fee the Corporate Associate Members are paying
 - Should make becoming a Member of CO-LaN more attractive financially
- License fee, “At cost” and “At cost plus” fees will be informed by:
 - Cost of development of Thermo PMC self-test suite
 - Cost of process for initial Thermo PMC certifications
- Corporate Associate Members who take part in initial testing of Thermo PMC self-test suite will NOT be charged for certification of these components
 - Even if it is decided subsequently to charge “At cost”

Testing – Options (reminder)

- **Level 1: Stand-alone testing of interface functionality**
- **Level 2: Stand-alone testing of features and best practice**
 - **In addition to testing of interface functionality in Level 1**
- **Level 3: One-to-one manual testing of software A with software B**
 - **Against generic test scenarios**
- **Level 4: One-to-one manual testing of Software A with software B to meet specific (current) business requirements of a single end-user**
 - **Different to Level 3, in that test scenario is specific to end-user's current business requirements**

Testing - Feedback

- **Vendors**
 - **Almost unanimous on Level 2**
- **Individual Associate Members & Academics**
 - **Near-majority for Level 2**
- **End-users**
 - **Level 3 or 4**

- **Other feedback will be taken into account in design of test-suite**

Testing - Proposal

- **Thermo PMC only in initial version of self-test suite**
 - **Other PMCs and PME's to follow later**
 - **Feedback from Thermo PMC used to inform further developments**
- **Levels 1 and 2**
 - **Interface functionality**
 - **Features and best practice**
- **End-user requirements for one-to-one testing (Levels 3 and 4) not met by Certification process**

Testing – Certification Process

- ❑ Vendor downloads the test suite and uses to test their CAPE-OPEN interfaces
- ❑ Vendor runs test suite on final “frozen” version, generates report and submits this report to the Chief Certification Officer (CCO)
- ❑ Vendor requests Certification from CCO
- ❑ CCO reviews reports
- ❑ CCO provides Certification Approval

Testing - Questions

□ Open source

- Previous recommendation was that self-test suite should be open source
 - Improves trust in the software
 - Source code is available to explain how tests are done
 - Allows vendors to challenge or add to the tests
- Conflicts with charging non-members?
- Is open source compatible with new CO-LaN IPR Policy?

□ Integration with vendor test systems

- Will the test suite be used:
 - Stand alone?
 - Integrated with vendors own testing software?
- If integrated, what interfaces are required?
- Please, let us know your requirements

Certification – Next Steps (1)

- **Feedback on integration with vendor testing software and process**
 - **Who: CO-LaN vendors**
 - **By when: At Annual Meeting 2020**
- **Discussion with Management Board on use of Open Source for the self-test Suite**
 - **Who: M R Woodman/ Chief Technology Officer / Management Board**
 - **By when: end 2020**

Certification – Next Steps (2)

- **Initial design of self-test suite, for both Levels 1 and 2, focusing on testing of Thermo PMC**
 - **Who: Software Development Resource**
 - **Review by the other members of the Certification Technical Steering Group**
 - **By when: end 2020**
- **Build & Testing of initial version of self-test suite**
 - **Who: Software Development Resource**
 - **By when: end Q1 2021**
- **Develop charter for new Certification SIG**
 - **Who: M R Woodman**
 - **By when: end Q1 2021**