

EstateMaster Technical Overview

Architecture

The EstateMaster software is a Windows Desktop application, developed using a combination of C# and VB programming languages in the Microsoft .Net 3.5 Framework.

Presentation Layer

EstateMaster utilises both WinForms and WPF (Windows Presentation Foundation) technologies for its user interface. The main spreadsheet user interface is based on a .Net control called SpreadsheetGear that operates independently of Microsoft Excel.

Other 3rd-party .Net controls and libraries are used throughout the applications for things such as menus, dialogs and forms, database connectivity, PDF generation and reporting. All the required files for these controls and libraries are distributed with the EstateMaster installation package.

Business Layer

The business logic comprises of a combination of the spreadsheet formula logic powered by the SpreadsheetGear libraries and proprietary logic for other core functionality such as Goal Seek, Sensitivity Analysis, Probability Analysis, Residual Land Value Analysis, etc.

Data Layer

EstateMaster promotes flexibility by utilising multiple Data layers:

1. When saving an EstateMaster file during day-to-day use, data is saved in XML (Extensible Markup Language) format and compressed to reduce storage requirements. No database connectivity is needed and data files can be treated like any other business document to be stored locally or on a file server.
2. Data can be exported to the EstateMaster Enterprise Database, a Microsoft SQL Server Database. This data layer is optional, and is only required if the user wishes to archive data in a central secure location and if they wish to utilise the EstateMaster CC (Corporate Consolidation) reporting and portfolio management solution.

When exporting to the EstateMasterEnterprise Database, the XML data file acts as an intermediary between the EstateMaster application and the SQL Server Database.



The following is stored in each data layer:

XML and SQL (Core Data)

- User Inputs: All input data entered by the user in the standard EstateMaster worksheets stored as their 'value' only (e.g. if the formula '=1+1' is entered in an input cell, then the value of '2' would be stored)
- Preferences: All the settings defined by the user in the EstateMaster Preferences.

XML

- Custom Formulas: All input data entered by the user in the standard EstateMaster worksheets stored as their corresponding 'formula' (e.g. if the formula '=A1+B3' is entered in an input cell, then the formula of '=A1+B3' would be stored)
- Custom Worksheets: All custom worksheets added to the Presentation layer (i.e the spreadsheet interface). They are saved as an XLSX file within the data file.



Deployment

Installation

The EstateMaster software is typically installed on a PC/Workstation or a Terminal Server, depending on the licensing requirements.

The optional EstateMaster Enterprise Database can be setup on an existing Microsoft SQL Server on the network (preferred option), allowing all users on that network to share the same data. It can also be set up on a user's local machine, but is only recommended if data sharing is not required.

Network Deployment

The EstateMaster software can be automatically deployed across multiple machines over a network using Group Policy in a Windows Server, or other 3rd-party software deployment tools such as Microsoft System Management Server. An MSI (Microsoft Installer Package) file is available for each of our products to assist in this process.

Virtual Application Servers

The EstateMaster software can be deployed and operated on Virtual Servers run on virtualization tools such as Microsoft App-V, VMware ThinApp, and Citrix XenApp, however support for these methods of deployment is limited. It is recommended that the EstateMaster software be tested in these environments prior to purchase.

Hosting

EstateMaster currently only provides an on-premise solution, that is, the software is installed and databases are hosted on the client's infrastructure. Some clients have deployed our software on Virtual Machines managed by 3rd-party Cloud Computing providers to provide this type of flexibility.

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Technical Overview

Licensing

License Types

The EstateMaster software utilises 3rd-party software protection for its security, code protection and licensing. There are 3 types of licenses available:

User/PC License

- The software is installed on a single computer (workstation or notebook) and licenced to be used by a single person only.
- Data files may be stored on the local computer or on a network file server.
- If more than one computer requires EstateMaster to be installed and registered on it, whether for the same person (who holds a user licence on another computer) or for a different person, this constitutes an additional licence.
- User/PC Licences cannot be used on Servers or machines running a server-based Operating System.

Client-Server ('Floating') CAS Licence

- The software is installed on individual computers and a Licence Server application is installed on any machine on the same network to control licence usage.
- The software can be used on multiple computers concurrently, but limited to the number of CAS Licences purchased.
- The Licence Server application uses UDP Broadcasting to establish a communication with itself and the client machines running EstateMaster.
- Over a WAN/VPN, these broadcast messages typically are not received by the server due to network configurations blocking this type of communication (e.g. firewalls, routers, etc). A Licence Server Finder utility is available to manually specify the IP address of the server in this scenario, which may resolve.

License Terms

Perpetual Licenses

Most EstateMaster products are based on perpetual license terms. A perpetual license is a one-time license fee that allows continued use of the software program for as long as the customer complies with all terms of the license agreement. The software can be upgraded to the latest version if a valid Annual Support and Software Assurance contract is held for that license.

Subscription Licenses

Also known as 'Non-Perpetual' licenses, subscription licenses are temporary and provide the right to use a particular licensed product until the end of the license agreement term. The license will expire on a certain date (normally a year after purchase) and the software will cease to run any more unless the contract is renewed.

Release Cycle

Minor Releases

The target release cycle for minor updates to the EstateMaster software is every 3-6 months, depending on the urgency of any critical updates to calculations.

Minor releases predominantly comprise of minor changes to functionality and reporting, and critical calculation updates.

Since EstateMaster is a primarily a financial-based application used for critical decision-making in an organisation, it is highly recommended that users are always running the latest version of the software with the most up-to-date calculations.

Major Releases

The target release cycle for major updates to the EstateMaster software is every 12-24 months.

Major releases predominantly comprise of significant changes to functionality, calculations and reporting.

Delivery

All updates are delivered via a download, and are communicated to all users (who have not opted-out from receiving software update email notifications) via email.

The software also has an automated 'Check for Updates' settings (which is enabled by default) which will check each time the software is started and alert the user when an update is available, giving them the option to download and install it.

Integration

API's

No API's are provided for the EstateMaster software.

Enterprise Database Integration

The EstateMaster Enterprise Database is a Microsoft SQL Database that contains all user-defined inputs, preferences and cash flow data generated by the various EstateMaster software programs (i.e. EstateMaster DF, DM, etc). Our proprietary business intelligence and reporting tool for the EstateMaster Enterprise Database is the EstateMaster CC (Corporate Consolidation) software, which enables the user to analyse EstateMaster data and generate various dashboards and reports.

The EstateMaster Enterprise Database is exposed, so that given the correct Microsoft SQL Server permissions, any user can create a connection to that database to run a query and return a dataset from any other 3rd-party application if required.

A database dictionary is provided, which documents what data is stored in the tables and fields in the EstateMaster Enterprise Database.

Integration with Other Systems

Various Integration Modules are available for the EstateMaster software to seamlessly connect with other 3rd-party systems to improve business automation, such as:

1. Microsoft Excel: Link EstateMaster DF, DM and IA with external Excel Workbooks to fetch live data and automate files.
2. Microsoft Word: Update Bookmark fields in Word Documents with outputs from a EstateMaster DF, DM and IA file to automate reporting.
3. MYOB AccountRight and EXO Business: Import actual costs and revenues from MYOB'S accounting solutions into EstateMaster DM for cash flow management.
4. Presence Lot Sales Manager: Import exchange and settlement data into the EstateMaster DM cash flow model for accurate sales revenue and inventory forecasting.

Custom integration to other accounting, inventory, sales, leasing or project management systems is available if required.

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