

Technical Documentation

gorelate Project Controlling

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Introduction

This document contains technical information about:

- network traffic contacting other servers than your Dynamics CRM instance, which we do to manage your license, and to update your solution upon request
- the solutions installed

Network Requests

When using **gorelate Project Controlling**, the client only communicates with your Dynamics CRM instance utilizing its Microsoft REST SDK based on the clients roles and rights, so your data is safe and cannot be sent to third party servers.

However, for licensing purposes (that is, obtaining/managing your license, and updating your gorelate solutions) some information is sent to our server **gorelate.net**.

As required – and technically reviewed – by Microsoft, this chapter lists which information is sent to our servers and when.

Network Requests to gorelate.net during Installation

During installation a trial license is automatically obtained from our **gorelate.net** server. The following – technically necessary - information from your instance will be sent to our server for obtaining – and maintaining – your license:

- The unique id of your org
- The org friendly name
- The actual org name
- The Guid of the systemuser installing the package

We would be glad if you would provide us your contact information when starting your trial directly in AppSource.

Network Requests to gorelate.net during License Management

The gorelate Licensing solution is responsible for managing your gorelate licenses. To do this, license information with references to your users are stored in custom entities – but just in your Dynamics instance. No user information is transferred to our servers.

To check for updated licenses, and to update your gorelate solutions, our gorelate.net server is contacted by the gorelate Licensing Solution – again sending the same minimal information that was sent during initialization:

Update license Info: This request sends the id of your org to our server, and returns the current license information (license type, end date, user count).

Download updated solution: This request sends the unique id of your org, the product (**gorelate Licensing, FlexGrid** or **Project Controlling**) and your current version number is sent to your server.

Installed Solutions

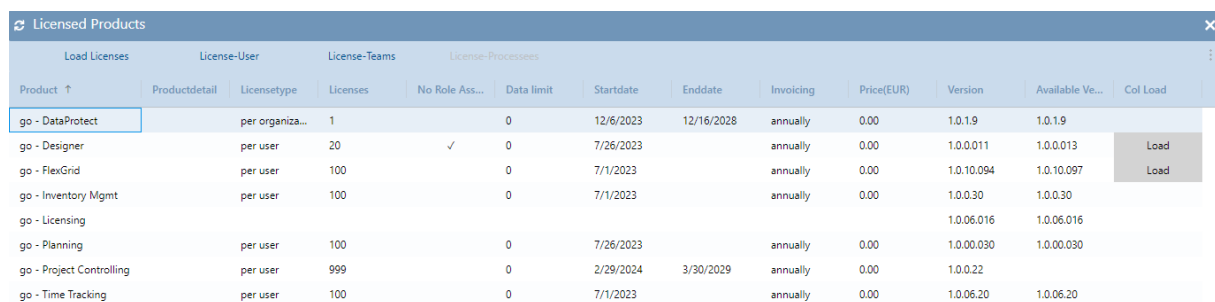
Your Project Controlling product consists of three managed solutions installed on your Dynamics instance:

gorelateLicensing solution

The **goLicensing** solution manages all your gorelate licenses and updates.

By installing a trial version of **Project Controlling** you get a fully functional license for all users for the trial period of one month. Please contact gorelate for information about license models and extending your license.

On the configuration view of the **gorelate Licensing** solution you may see your gorelate licenses, including the license type and its expiration:



Licensed Products												
Load Licenses		License-User		License-Teams		License-Processes						
Product ↑	Productdetail	Licensetype	Licenses	No Role Ass...	Data limit	Startdate	Enddate	Invoicing	Price(EUR)	Version	Available Ve...	Col Load
go - DataProtect		per organiza...	1		0	12/6/2023	12/16/2028	annually	0.00	1.0.1.9	1.0.1.9	
go - Designer		per user	20	✓	0	7/26/2023		annually	0.00	1.0.0.011	1.0.0.013	Load
go - FlexGrid		per user	100		0	7/1/2023		annually	0.00	1.0.10.094	1.0.10.097	Load
go - Inventory Mgmt		per user	100		0	7/1/2023		annually	0.00	1.0.0.30	1.0.0.30	
go - Licensing										1.0.06.016	1.0.06.016	
go - Planning		per user	100		0	7/26/2023		annually	0.00	1.0.00.030	1.0.00.030	
go - Project Controlling		per user	999		0	2/29/2024	3/30/2029	annually	0.00	1.0.0.22		
go - Time Tracking		per user	100		0	7/1/2023		annually	0.00	1.0.06.20	1.0.06.20	

You may also update to the latest available version of each managed solution by just pressing the load button (which is only displayed if there is a newer version available).

It is recommended to update to the latest version after installing the Project Controlling package from Microsoft AppSource.

gorelateFlexGrid solution

gorelate FlexGrid is a process engine with flexible customizable user interfaces. The solution can be licensed separately from the Project Controlling application to implement custom processes, but no separate license is needed for the overview grid implemented in Project Controlling.

If interested please visit <https://www.gorelate.com/en/crm/add-ons/flexible-grid/> for further information about available products based on the Flex Grid technology, and the possibilities to improve productivity of your own Dynamics 365 processes.

gorelateProjectControlling solution

The Project Controlling Solution consists of:

- Model Driven App "gorelate Project Controlling Demo":
Mainly used for demonstration purposes the app contains a project form that has the project controlling UI component integrated in a separate tab.
- Entity msdyn_project:
Contains a Form "Project Controlling Demo" which is derived from the project operations out-of-the-box form. An additional tab "Project Controlling" has been added to the form containing the HTML component that shows the project controlling overview.
- Entity msdyn_projecttask:
New columns have been introduced to persistently store the current calculation results:
 - gocore_invoicablehoursbooked (Decimal):
Contains the sum of all invoicable actuals related to the project task. Is only populated if the project task is associated with an invoiceable contract line.
 - gocore_noninvoicablehoursbooked (Decimal):
Contains the sum of all non-invoicable actuals related to the project task. If the project task is not associated with a contract line all actuals are counting towards the non-invoicable hours.
 - gocore_availablehours (Decimal):
Contains the amount of hours that are still available after deducting the already booked hours from the estimated effort.
Calculated: $[\text{msdyn_effort} - \text{gocore_invoicablehoursbooked}]$
 - gocore_previewhours (Decimal):
Contains the sum of all timeentries related to the project task which are in status "Draft" or "Submitted".
 - gocore_availablehoursinclpreview (Decimal):
Contains the amount of hours that are still available after deducting the already booked hours as well as not yet submitted hours from the estimated effort.
Calculated: $[\text{msdyn_effort} - \text{gocore_invoicablehoursbooked} - \text{gocore_previewhours}]$
 - gocore_budgetconsumed (Decimal):
Contains the information which percentage of the estimated effort is already consumed by already booked hours and not yet submitted hours.
Calculated: $[\frac{(\text{gocore_invoicablehoursbooked} + \text{gocore_previewhours})}{\text{msdyn_effort}} * 100]$
 - gocore_degreeoffulfillment (Integer):
Users can enter the subjective degree of fulfillment of this project task which will then be used for the following calculation.

- `gocore_reserve` (Decimal):
Contains the proportion of Consumed Budget to Degree of Fulfillment. So this answers if based on the degree of fulfillment and the already consumed budget the completion of the task within the original estimated effort will be feasible and if there might even be some budget left over after finishing the task.

Calculated:

```
IF (gocore_degreeoffulfillment >0) {
  IF (msdyn_effort >0) {
    (1-( gocore_budgetconsumed / gocore_degreeoffulfillment))* msdyn_effort)
  }
  ELSE {
    (-1) * ( gocore_invoicablehoursbooked + gocore_previewhours)
  }
}
ELSE {
  0
}
```

- `gocore_triggercalc` (Decimal):
Dummy field which is used to trigger plugin calculations
- Web Ressources used for the configuration of the Flex Grid table:
`gocore_/xml/msdyn_projecttask.xml`
- A plugin (gorelate.solutions.pc) with 7 plugin steps registered on certain events of entities `msdyn_actual`, `msdyn_projecttask` and `msdyn_timeentry`.

Each user using `gorelate` Project Controlling needs a license. License management can be done using the `gorelate` Licensing solution:

The screenshot shows the 'gorelate Licensing' interface. On the left, there is a table titled 'Lizenzierte Produkte' (Licensed Products) with columns for 'Produkt', 'Produktde...', 'Lizensieru...', and 'Lizenzanz...'. The table lists four products: 'go - FlexGrid', 'go - Licensing', 'go - Planning', and 'go - Time Tracking', all with a license type of 'pro User' and a quantity of '999'.

On the right, there is a detailed view for a specific organization, 'org546faac8 (3)'. It shows a table with columns for 'Suche', 'Rollen', 'Unterneh...', 'AdminLizenz', 'Lizenz', and 'Roll'. The table lists three users: 'Alexander Holzer', 'Mona Market', and 'Simon Saller', all with the organization ID 'org546faac8'. The 'AdminLizenz' column has checkboxes, and the 'Lizenz' column has checkboxes. The 'Summe' row shows a total of 2 for 'AdminLizenz' and 1 for 'Lizenz'.