

Sage Evolution ERP

by Sage Pastel

sage

The Freedom Service Sage Evolution Premium Version 7



Freedom Service - Overview

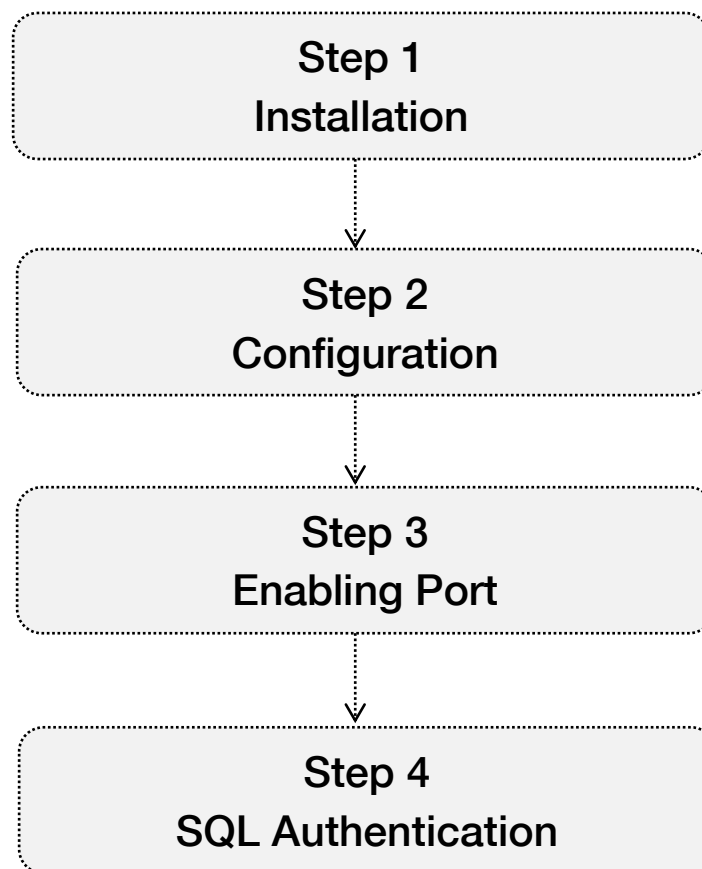
The Freedom Service is a tool that allows the Sage Evolution Dashboard and Central Search features of your company database to function.

By setting up the Freedom Service, the communication between the Sage Evolution Core and the SQL Server database will be enabled.

This in turn will enable dashboards displaying user selected information in visual and interactive graphs.

Set up Process

The following steps will ensure a successful Freedom Service Set up



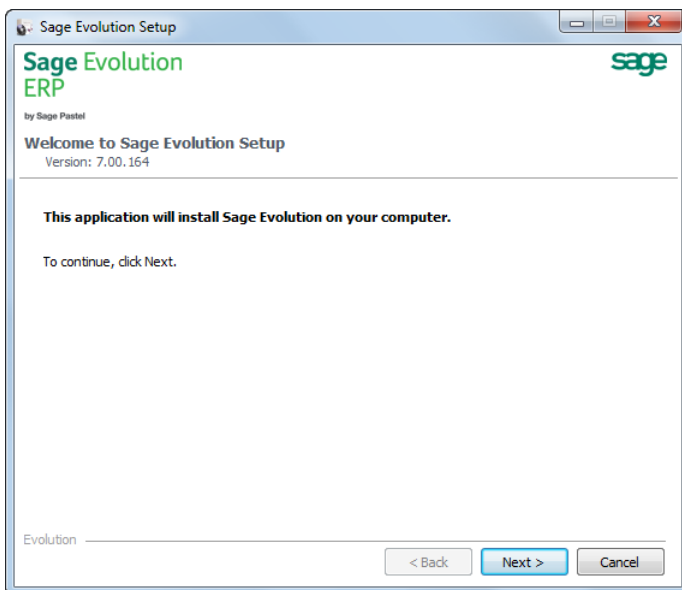
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Step 1 – Installation

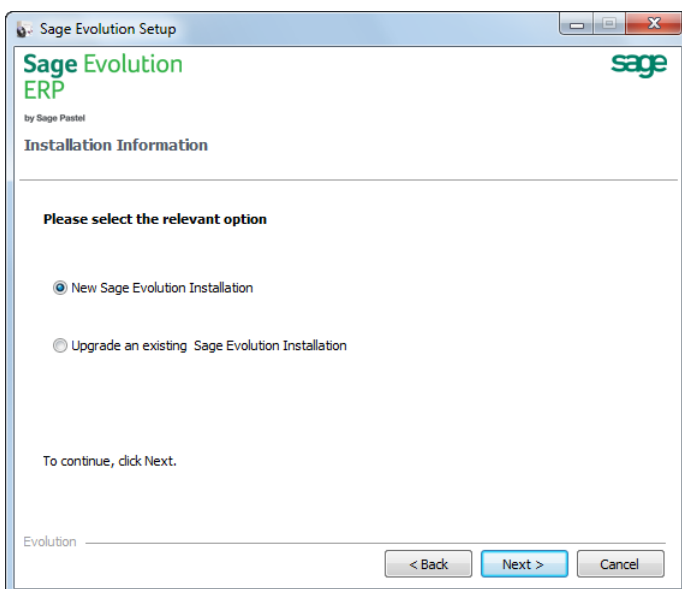
In order to make use of the interactive Dashboards as well as the Central Search feature you will need to install the Freedom Service.

Follow the steps below to install the Freedom Service:

Locate the **Setup.exe** file on the Evolution installation DVD. Double click on this file to start the installation process. The screen displays as follows:



Click on the **Next** button. The screen displays as follows:



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Specify the type of installation required. You will be able to select between the following options:

- New Sage Evolution Installation
- Upgrade and existing Sage Evolution Installation

Important Information

If you have installed and / or upgraded Sage Evolution and only want to install the Freedom Service, select the New Sage Evolution Installation option by selecting the corresponding radio button.

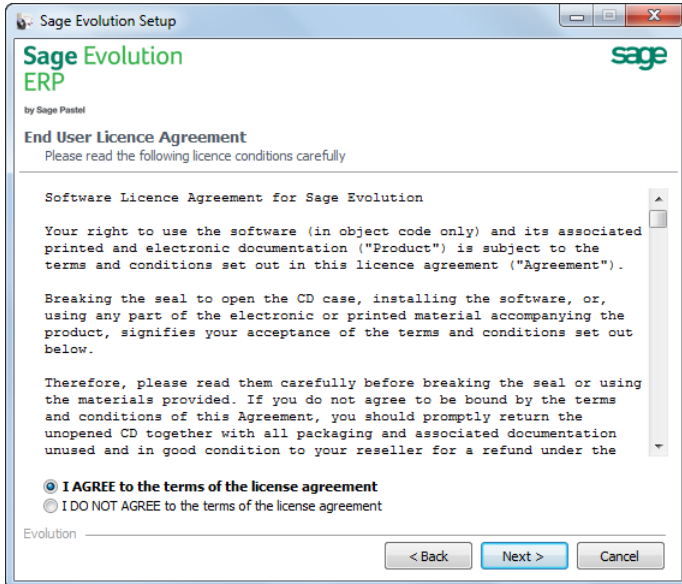
Click on the **Next** button. The screen displays as follows:

The screenshot shows a window titled "Sage Evolution Setup" with the Sage Evolution ERP logo and "by Sage Pastel" text. The main heading is "Customer Information" with the instruction "Please enter your registration information". There are three text input fields: "User Name" (containing "User Name"), "Organisation" (containing "Organisation"), and "Country" (a dropdown menu showing "South Africa"). There is also an "Installation" dropdown menu with "Premium" selected and "Standard" visible below it. At the bottom, there are three buttons: "< Back", "Next >" (highlighted in blue), and "Cancel".

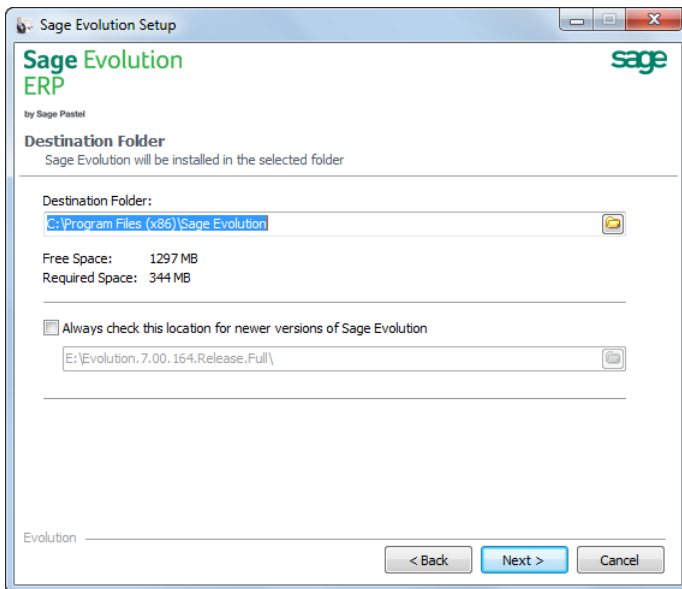
Enter your company information in the fields provided. From the **Country** dropdown menu, select applicable county. From the **Installation** dropdown menu, select the **Premium** option.

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Click on the **Next** button. The screen displays as follows:



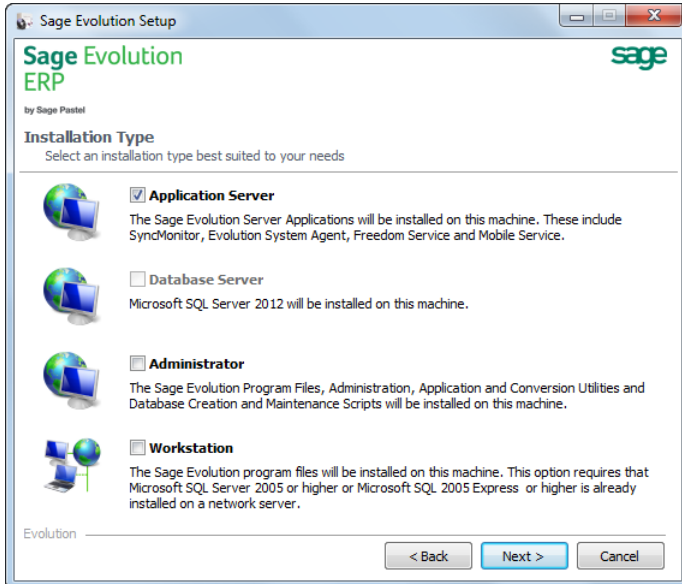
Select the **I AGREE to the terms of the license agreement** options and click on the **Next** button. The screen displays as follows:



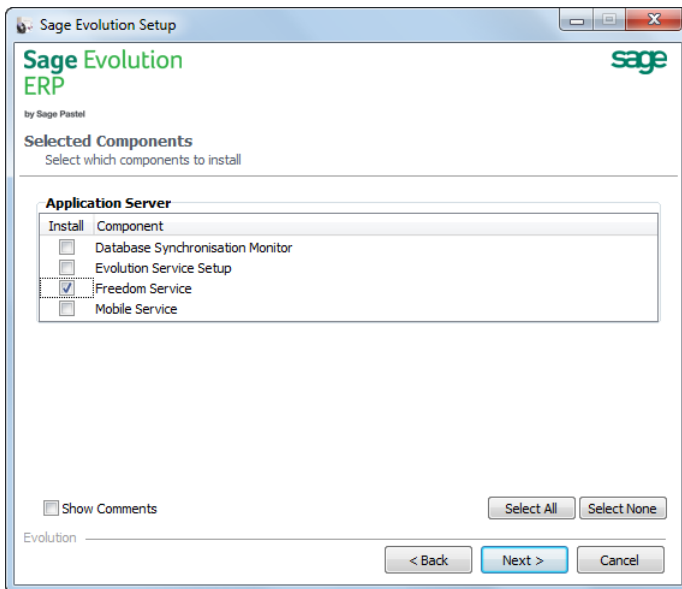
Select the destination folder to where Sage Evolution will be installed to.

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Click on the Next button. The screen displays as follows:



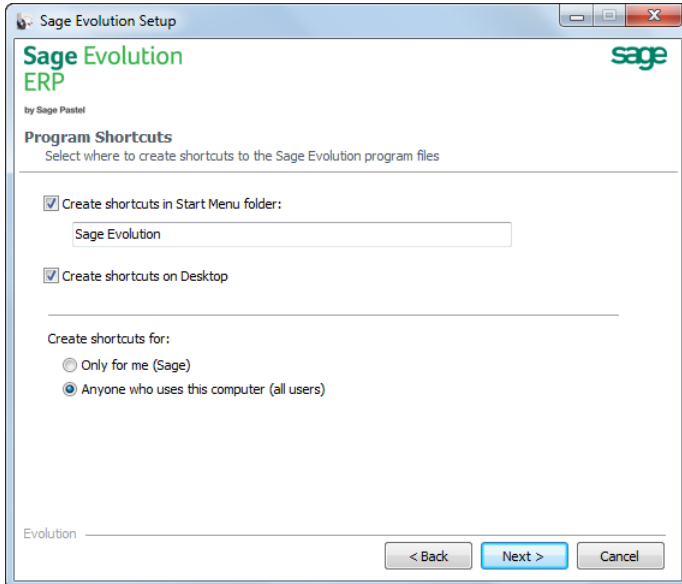
Select the **Application Server** tickbox and click on the **Next** button. The screen displays as follows:



Under the **Application Server** options, select the **Freedom Service** tickbox.

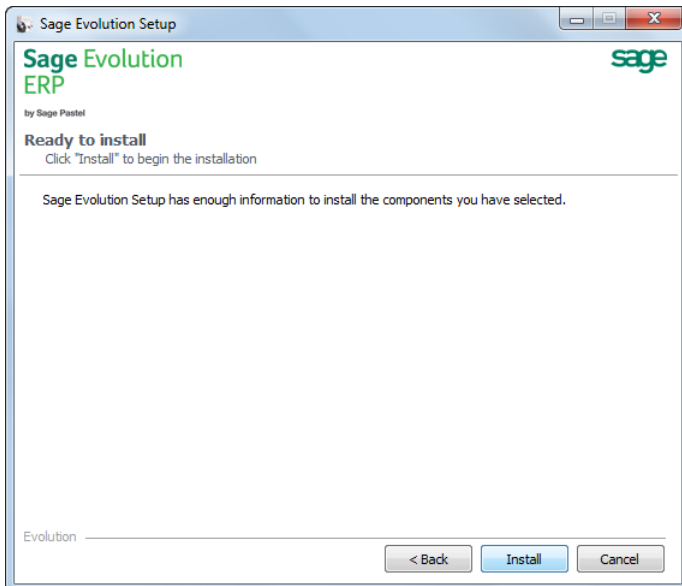
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Click on the **Next** button. The screen displays as follows:



Select the **Create shortcuts in Start Menu folder** as well as the **Create shortcuts on Desktop** option/s if you require short cut icons to be created.

Click on the **Next** button. The screen displays as follows:

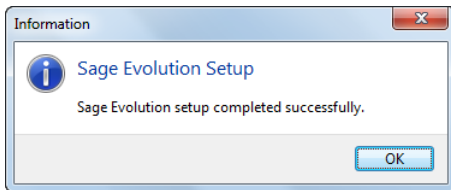


Click on the **Install** button to start the installation process.

Important Information

The Freedom Service requires .NET version 4.5 as a prerequisite. The system will detect if this specific version of .NET framework is not installed and install it automatically.

The Freedom Service has been successfully installed.

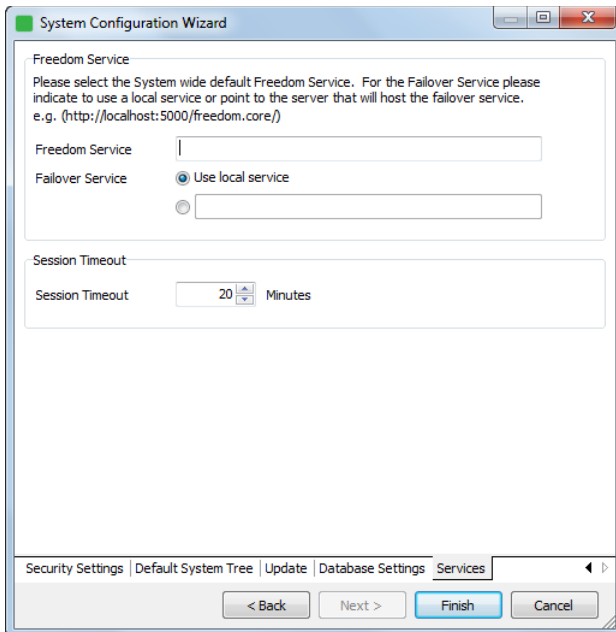


Click on the OK button to complete the installation process.

Step 2 - Configuration

After successful installation of the Freedom Service it is required to configure both the Freedom as well as the Failover service.

From within your Sage Evolution company navigate to the **System Wizard**, by selecting the option from the **Administrator** menu option. Locate and select the **Services Tab**. The screen displays as follows:



Enter the Freedom Service default information into the Freedom Service field. For the Failover Service indicate whether to use a local service or whether it will point to a different server.

Click on the Finish button to save the Freedom Service and Failover Service configuration settings.

Step 3 – Enabling

In order for the Freedom Service to establish a connection between all components, it is essential to enable a specific HTTP port on your Windows Firewall where the Freedom Service is installed.

To access your **Windows Firewall**, go to the **Start menu...Control Panel**. To create these new rules, go to **Advanced Settings** and select the **Inbound** and **Outbound Rules** options.

Important Information

Consult with your network administrator before adding ports to your Windows Firewall. If you are not using the standard Windows Firewall, ensure that you add these port rules to the firewall software installed on the server where the Freedom Service resides.

Use the information provided in the table below to create the required inbound and outbound rule using the **Windows Firewall New Rule Wizard**.

	Http Port
Rule Type	Port
Protocol	TCP
Specific local ports	5000
Action	Allow the connection
Profile	Select either Domain, Private, or Public or all
Name	Freedom HTTP

For more information on adding rules on a Windows Firewall click [here](#)

Step 4 – SQL Authentication

In order for the Freedom Service to establish a connection between all components, it is essential to make sure that the correct SQL Authentication Method is selected. This applies to the communication between your Sage Evolution company and the SQL Server database.

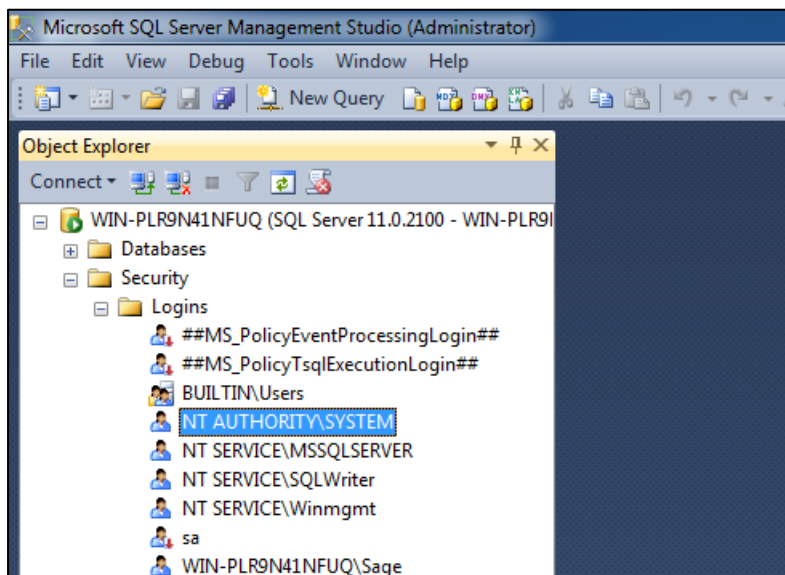
Microsoft SQL supports two authentication types / models. The table below explains the two available options:

Windows NT authentication (default) Trusted Connection

This type of security uses the Windows principal token from the user's operating system to create trusted connections from Sage Evolution to the SQL database. The connection is made using the user's Windows account details. The user requires a user name and password when accessing the SQL database on the server.

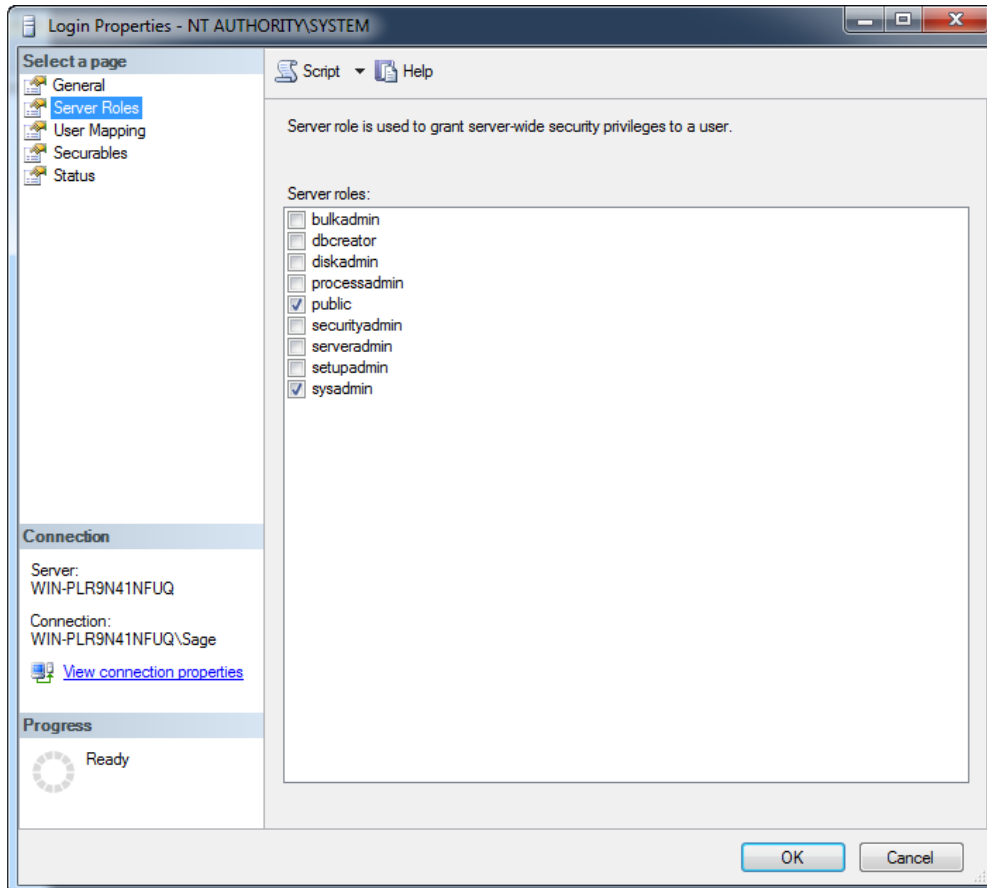
If you are using **Windows NT authentication** ensure that the **sysadmin** server role has been enabled for the **NT AUTHORITY\SYSTEM** user.

To check whether the required server role has been enabled, open **Microsoft SQL Server Management Studio** on the machine installed with the Freedom Service. Connect to the SQL database, expand the **Security** folder and locate the **Logins** folder. The screen displays as follows:



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Locate the **NT AUTHORITY\SYSTEM**, right click and then select the **Properties** option. The screen displays as follows:



Select the **Server Roles** page option and ensure that the **sysadmin** tickbox has been ticked.

Click on the **OK** button to save changes.

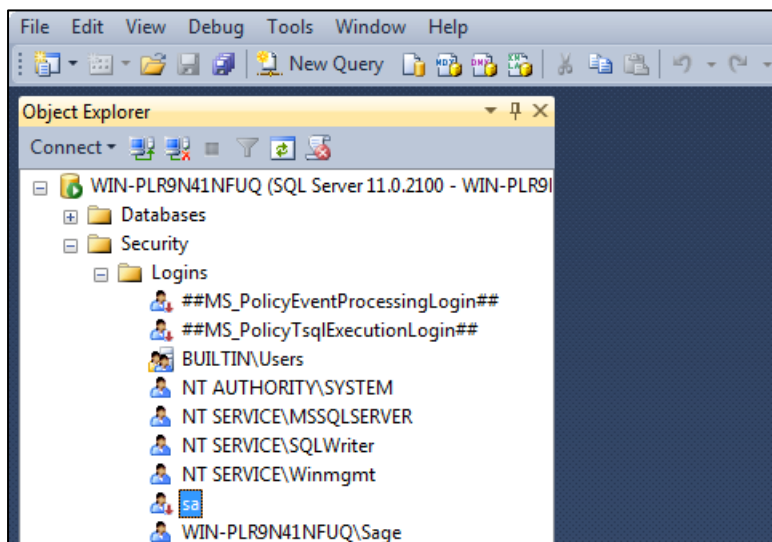
SQL Server authentication

This type of security uses login details created in the SQL Server and is not linked to Windows user accounts. Each time the user connects to a SQL Server database they must provide a login name and password.

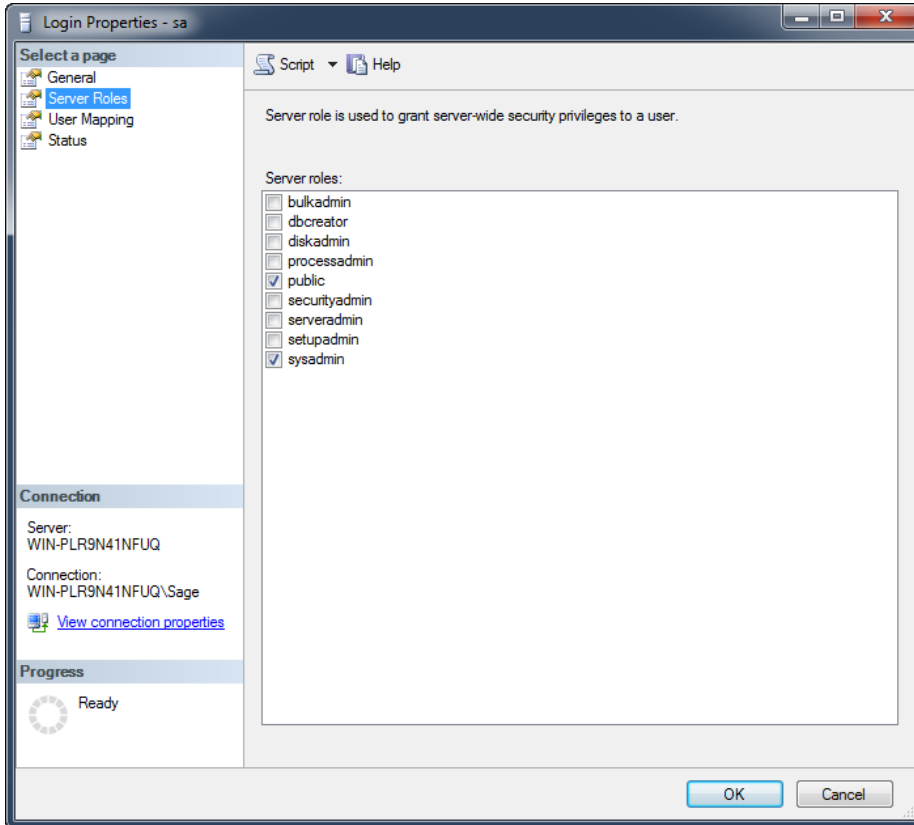
If you are using **SQL Server authentication** ensure that the **sysadmin** server role has been enabled for the **sa** user.

To check whether the required server role has been enabled, open **Microsoft SQL Server Management Studio** on the machine installed with the Freedom Service.

Connect to the SQL database, expand the **Security** folder and locate the **Logins** folder. The screen displays as follows:



Locate **sa**, right click and then select the **Properties** option. The screen displays as follows:



Select the **Server Roles** page option and ensure that the **sysadmin** tickbox has been ticked.

Click on the **OK** button to save changes.

Important Information

The selected authentication for the Freedom service has to correlate to your SQL Database authentication. Consult with your IT administrator if you are unsure of your current database authentication method. During the installation process of Sage Evolution, the authentication method defaults to Windows Authentication.

Troubleshooting

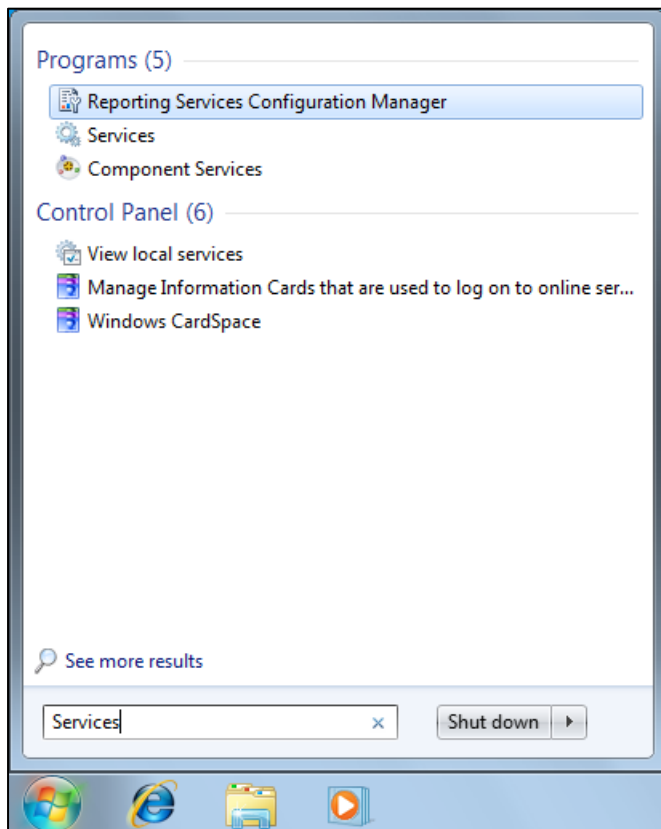
When attempting to connect with the Freedom Service, the following status / error messages may display. The table below contains solutions to apply in order to resolve the issue.

Message	Solution
Success	The connection to the freedom service was successful.
Connection string already exist	The Freedom Service already has a link to the connection string.
Friendly name already exists	The Freedom Service already has a link to a database with the name you are trying to use. You are then given the option to use this link.
Unable to connect using the connection string provided	There is an issue when trying to connect to the Freedom Service. This message encompasses anything that could prevent the connection ie invalid user name / password / permission.
Please try again later	This message usually occurs when the Freedom Service installation has become corrupt. You will need to repair the Freedom Service installation.
Socket error #10061	Connection refused – This error occurs when the Freedom Service is not started / running and the Sage Evolution company is trying to connect to the Freedom Service.

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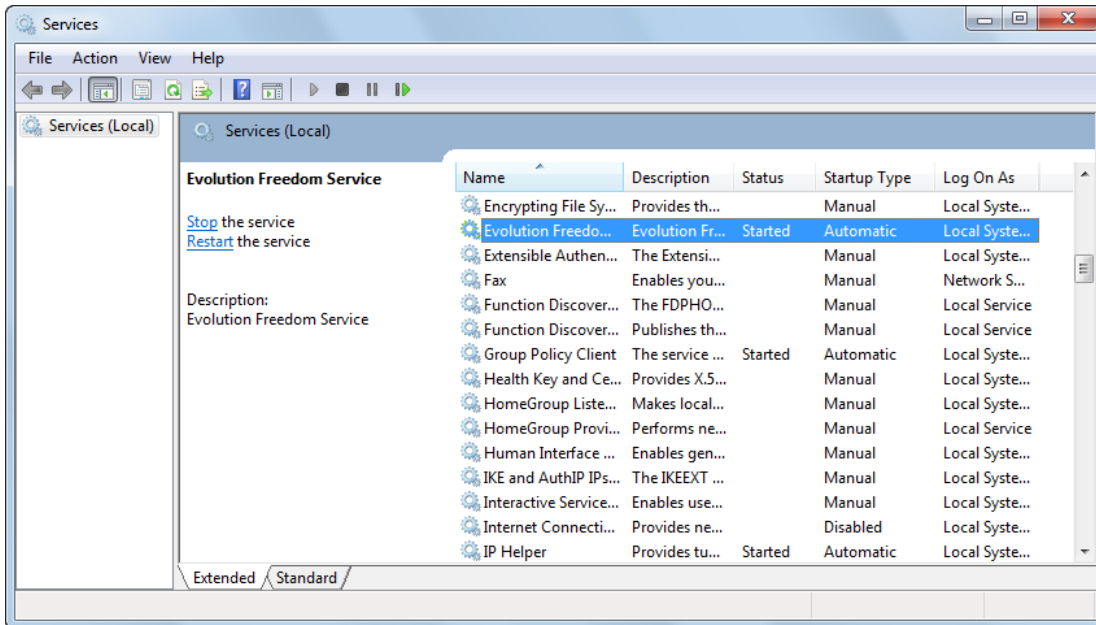
If the connection still fails or if any of the features depended on the Freedom service are not functioning, make sure that your windows user has access / permission to the Freedom service.

From the **Start** menu, enter **Services** into the search field. The screen displays as follows:

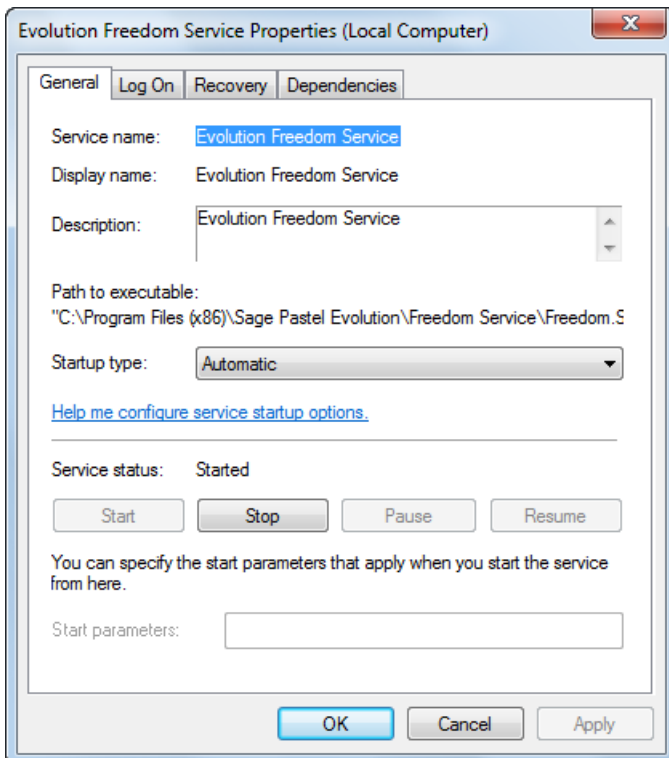


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Select the **Services** option from the search result area. Browse and locate the **Evolution Freedom Service** option. The screen displays as follows:

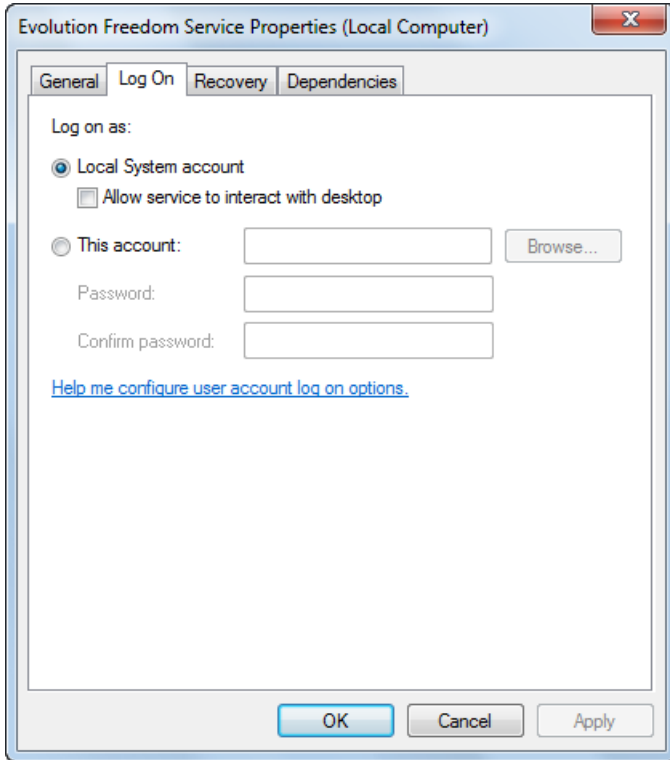


Select the service and right click. From the menu select the **Properties** option. The screen displays as follows:



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Click on the **Log On** tab. The screen displays as follows:



Instead of using the **System account**, select the **This account** radio button in order to specify required account details. Click on the **Browse** button to locate the required user account, and then enter the password into the **Password** and **Confirm password** fields.

Click on the **OK** button to save changes made to the service properties.

You will have to restart the **Evolution Freedom Service** for the changes to take effect.