by Sage Pastel

The Freedom Service Sage Evolution Premium Version 7



sage

Freedom Service - Overview

The Freedom Service is a tool that allows the Sage Evolution Dashboard and Central Search features of you 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





by Sage Pastel

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:

Sage Evolution Setup	
Sage Evolution	sage
ERP	
by Sage Pastel	
Velcome to Sage Evolution Setup Version: 7.00.164	
This application will install Sage Evolution on your computer.	
To continue, click Next.	
Evolution < Back Net	kt > Cancel

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

Sage Evolution Setup	
Sage Evolution ERP	sage
by Sage Pastel	
Installation Information	
Please select the relevant option	
New Sage Evolution Installation	
Upgrade an existing Sage Evolution Installation	
To continue, click Next.	
Evolution	
	Cancel





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:

Sage Evolution Setup		
Sage Evolution ERP		sage
by Sage Pastel		
Customer Information Please enter your registration information		
User Name		
User Name		
Organisation		
Organisation		
Country South Africa	Installation Premium Premium Standard	
Evolution	< Back	Next > 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.



by Sage Pastel

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

Sage Evolution Setup	
Sage Evolution Sage	;
by Sage Pastel	
End User Licence Agreement Please read the following licence conditions carefully	
Software Licence Agreement for Sage Evolution	
Your right to use the software (in object code only) and its associated printed and electronic documentation ("Product") is subject to the terms and conditions set out in this licence agreement ("Agreement").	J
Breaking the seal to open the CD case, installing the software, or, using any part of the electronic or printed material accompanying the product, signifies your acceptance of the terms and conditions set out below.	
Therefore, please read them carefully before breaking the seal or using the materials provided. If you do not agree to be bound by the terms and conditions of this Agreement, you should promptly return the unopened CD together with all packaging and associated documentation unused and in good condition to your reseller for a refund under the	
I AGREE to the terms of the license agreement I DO NOT AGREE to the terms of the license agreement	
Evolution Cancel	j

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

Sage Evolution Setup	
Sage Evolution ERP	sage
by Sage Pastel	
Destination Folder Sage Evolution will be installed in the selected folder	
Destination Folder:	
C:\Program Files (x86)\Sage Evolution	
Free Space: 1297 MB Required Space: 344 MB	
E: Evolution. 7.00. 164.Release.Full	
Evolution < Back Next >	Cancel

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



by Sage Pastel

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:

😽 Sage Ev	volution Setup
Sage E	Evolution sage
ERP	
by Sage Pastel	
Selected	l Components
Select w	which components to install
	- 11 6
Applica	Component
	Database Synchronisation Monitor
	Evolution Service Setup
V	Freedom Service
	Mobile Service
Show	v Comments Select All Select None
Evolution -	
E+0120011 -	< Back Next > Cancel

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



by Sage Pastel

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

Sage Evolution Setup	
Sage Evolution ERP	sage
by Sage Pastel	
Program Shortcuts	
Select where to create shortcuts to the Sage Evolution program files	
☑ Create shortcuts in Start Menu folder:	
Sage Evolution	
Create shortcuts on Desktop	
Create shortcuts for:	
Only for me (Sage)	
Anyone who uses this computer (all users)	
Evolution	
< Back Next >	Cancel

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:

Sage Evolution Setup	
Sage Evolution ERP	sage
by Sage Pastel	
Ready to install Click "Install" to begin the installation	
Sage Evolution Setup has enough information to install the components you have select	ted.
Evolution	
< Back Install	Cancel

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.

Informat	ion 💌
1	Sage Evolution Setup Sage Evolution setup completed successfully.
	ОК

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:

System Configura	tion Wizard		
Freedom Service			
Please select the Sys indicate to use a loca e.g. (http://localhos	tem wide default Freedom Service. For the Failover I service or point to the server that will host the failo :5000/freedom.core/)	Service please ver service.	
Freedom Service			
Failover Service	Output Use local service		
Session Timeout			
Session Timeout	20 Minutes		
Security Settings De	ault System Tree Update Database Settings Ser	vices 🔹	
	<back next=""> Fin</back>	nish Cancel	

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



sage

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:





by Sage Pastel

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

Login Properties - NT AUTHO	DRITY\SYSTEM	
Select a page	🖾 Script 🔻 🎼 Help	
Server Roles User Mapping Securables	Server role is used to grant server-wide security privileges to a user.	
Status	Server roles:	
	bulkadmin	
	diskadmin	
	securityadmin	
	setupadmin	
	▼ sysadmin	
Connection		
Server: WIN-PLR9N41NFUQ		
Connection: WIN-PLR9N41NFUQ\Sage		
View connection properties		
Progress		
Ready		
	ОК	Cancel

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:







📒 Login Properties - sa	
Select a page	Script 🔻 📳 Help
Server Roles User Mapping Status	Server role is used to grant server-wide security privileges to a user.
	Server roles:
	bulkadmin dbcreator diskadmin processadmin state
	V public securityadmin serveradmin setupadmin
	Sysadmin
Connection	
Server: WIN-PLR9N41NFUQ	
Connection: WIN-PLR9N41NFUQ\Sage	
Mew connection properties	
Progress	
Ready	
	OK Cancel

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.			





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:





by Sage Pastel

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

Services							x
File Action View	Help						
	à 🔒 🛛 🖬 🕨 🔲 II 🕨						
Services (Local)	Services (Local)						
	Evolution Freedom Service	Name	Description	Status	Startup Type	Log On As	*
		鵒 Encrypting File Sy	Provides th		Manual	Local Syste	
	Stop the service	🔍 Evolution Freedo	Evolution Fr	Started	Automatic	Local Syste	
	Restore the service	🌼 Extensible Authen	The Extensi		Manual	Local Syste	-
		🔍 Fax	Enables you		Manual	Network S	=
	Description:	🔍 Function Discover	The FDPHO		Manual	Local Service	
	Evolution Freedom Service	🔍 Function Discover	Publishes th		Manual	Local Service	
		鵒 Group Policy Client	The service	Started	Automatic	Local Syste	
		🤹 Health Key and Ce	Provides X.5		Manual	Local Syste	
		🤹 HomeGroup Liste	Makes local		Manual	Local Syste	
		鵒 HomeGroup Provi	Performs ne		Manual	Local Service	
		🔍 Human Interface	Enables gen		Manual	Local Syste	
		🔍 IKE and AuthIP IPs	The IKEEXT		Manual	Local Syste	
		🔍 Interactive Service	Enables use		Manual	Local Syste	
		鵒 Internet Connecti	Provides ne		Disabled	Local Syste	
		🎑 IP Helper	Provides tu	Started	Automatic	Local Syste	-
	Extended Standard						

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

Evolution Freedom Service Properties (Local Computer)	×		
General Log On Recovery Dependencies			
Service name: Evolution Freedom Service			
Display name: Evolution Freedom Service			
Description: Evolution Freedom Service	*		
Path to executable: "C:\Program Files (x86)\Sage Pastel Evolution\Freedom Servic	e\Freedom.S		
Startup type: Automatic	-		
Help me configure service startup options.			
Service status: Started			
Start Stop Pause I	Resume		
You can specify the start parameters that apply when you start the service from here.			
Start parameters:			
OK Cancel	Apply		



by Sage Pastel

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

Evolution Freedom Service Properties (Local Con	nputer)			
General Log On Recovery Dependencies				
Log on as:				
 Local System account Allow service to interact with desktop 				
This account:	Browse			
Password:				
Confirm password:				
Help me configure user account log on options.				
ОК	Cancel Apply			

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 safe changes made to the service properties.

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