

Sage 200 Evolution Installation Procedure

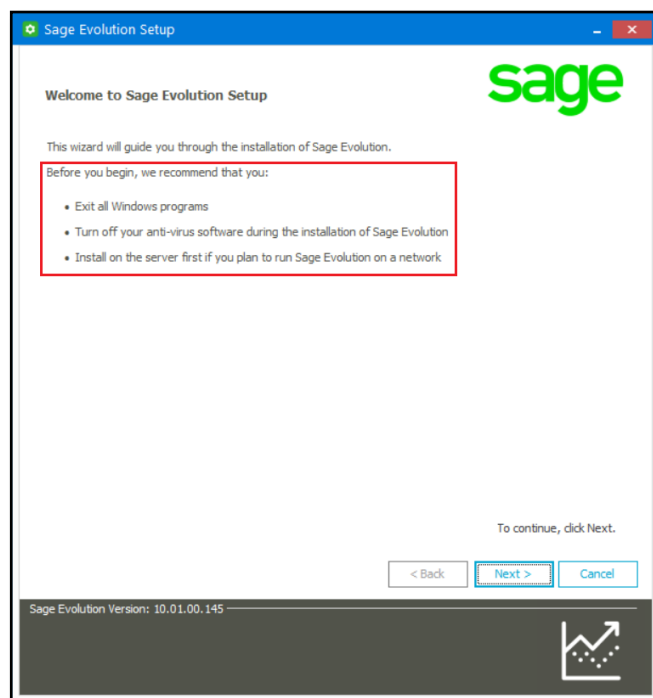
This article explains how to install Sage 200 Evolution. Note that when this article has been published, Evolution version 10.1.3.006 was the current latest version.

Preparation before the installation commences:

1. If this installation procedure forms part of an upgrade procedure:
 - Plan ahead when the upgrade should occur. This date and time should make provision for ample time for a complete Evolution network downtime and when all users are logged out of all Evolution companies.
 - Also, always start with the main Evolution Server PC and only when the company upgrades have been successfully completed, install Evolution on all the workstations so that they're all on the same version/build.
 - Backup all Sage Evolution companies as well as the SageCommon / EvolutionCommon database.
 - If using Sage Intelligence, manually export all customised report layouts.
2. Close all other applications on the local PC before installing Evolution.

Apply the following steps to achieve the above outcome:

1. Ensure you are logged onto the PC with a Windows account linked to the local PC's Administrator group.
2. Open the Evolution install directory and then double click the **Setup.exe** file to start the installation process.
3. Consider and apply the recommended steps stipulated below.



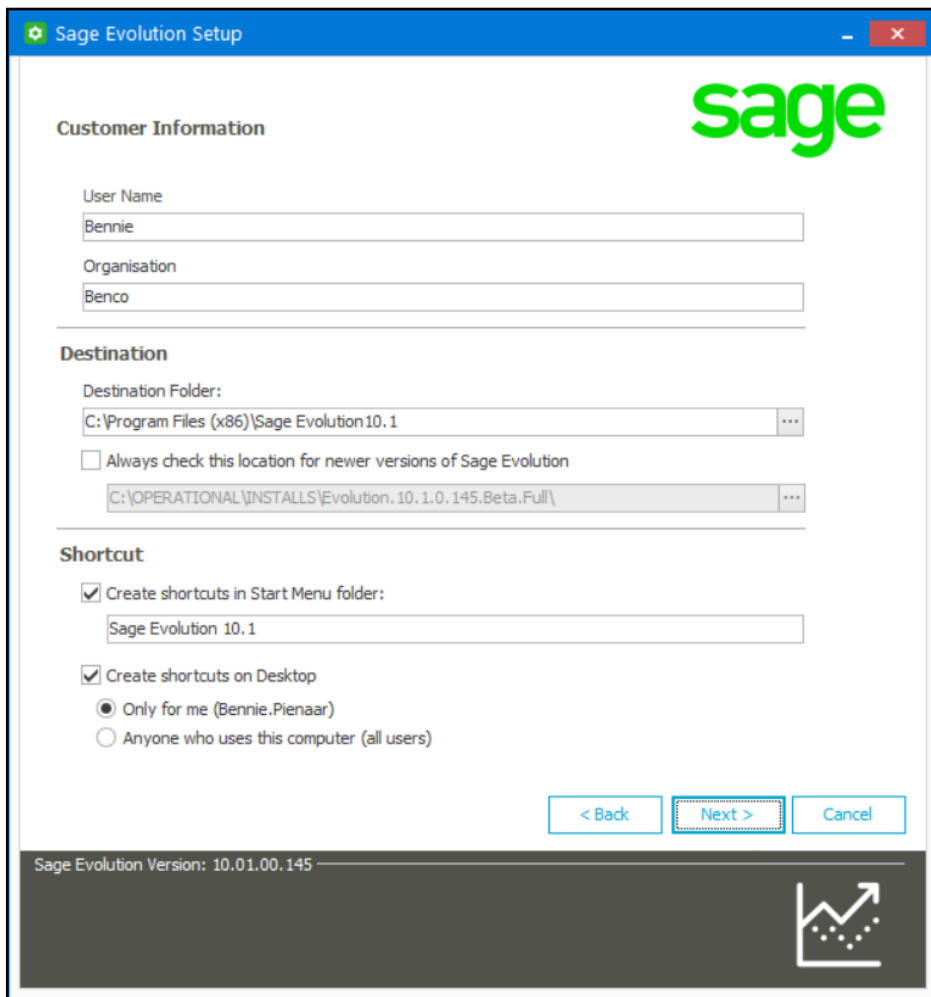
4. Click **Next** at the bottom of the screen above when done.
5. Complete the fields below according to your details and requirements.

Please note the following:

Destination Folder:

You can have multiple versions of Evolution installed on the same PC. Doing this proves especially helpful if you want to work in a test environment while still also working live in your current version of Evolution.

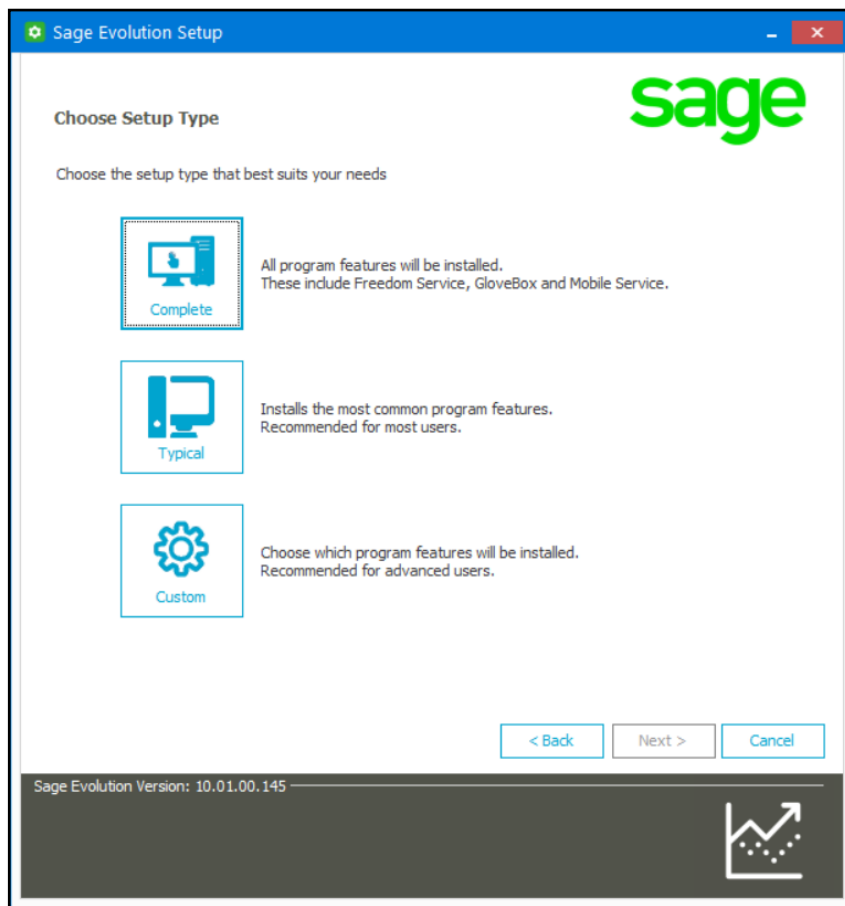
In that case, also specify the version as part of the folder name to be created upon installation as can be seen below (and not just Sage Evolution).



The screenshot shows the 'Sage Evolution Setup' window. The 'Customer Information' section is filled with 'Bennie' for User Name and 'Benco' for Organisation. The 'Destination' section shows the 'Destination Folder' as 'C:\Program Files (x86)\Sage Evolution10.1'. There is an unchecked checkbox for 'Always check this location for newer versions of Sage Evolution' and a text box below it containing 'C:\OPERATIONAL\INSTALLS\Evolution. 10.1.0.145.Beta.Full\'. The 'Shortcut' section has two checked options: 'Create shortcuts in Start Menu folder' (with 'Sage Evolution 10.1' in the text box) and 'Create shortcuts on Desktop' (with 'Only for me (Bennie.Pienaar)' selected). At the bottom right are '< Back', 'Next >', and 'Cancel' buttons. The status bar at the bottom left shows 'Sage Evolution Version: 10.01.00.145' and a line graph icon on the right.

6. When done, click the **Next** button above to continue.

7. Consider the 3 main installation options below by considering the comment next to each option:

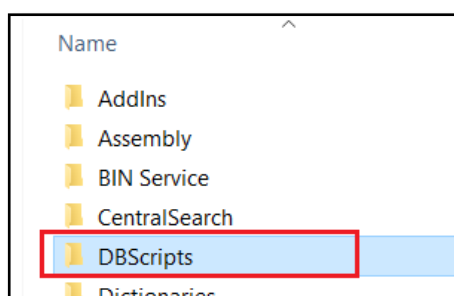


In addition to the comments next to each installation option below, also consider the following additional notes for each installation option:

Complete:

Select this option when installing on the Evolution server PC and each Evolution PC where database administration duties need to be performed on such as company creation, upgrading and/or copy company.

One of the key components (among several others) that will be installed in this case is the **DBScripts** sub-folder as required for the abovementioned database administrative duties.



Typical:

Select this option if you want to install only the core modules of Evolution in addition to the Sage Intelligence Reporting and Municipal Billing add-on modules.

This installation will not result in the **DBScripts** sub-folder to be created in the installed Evolution folder.

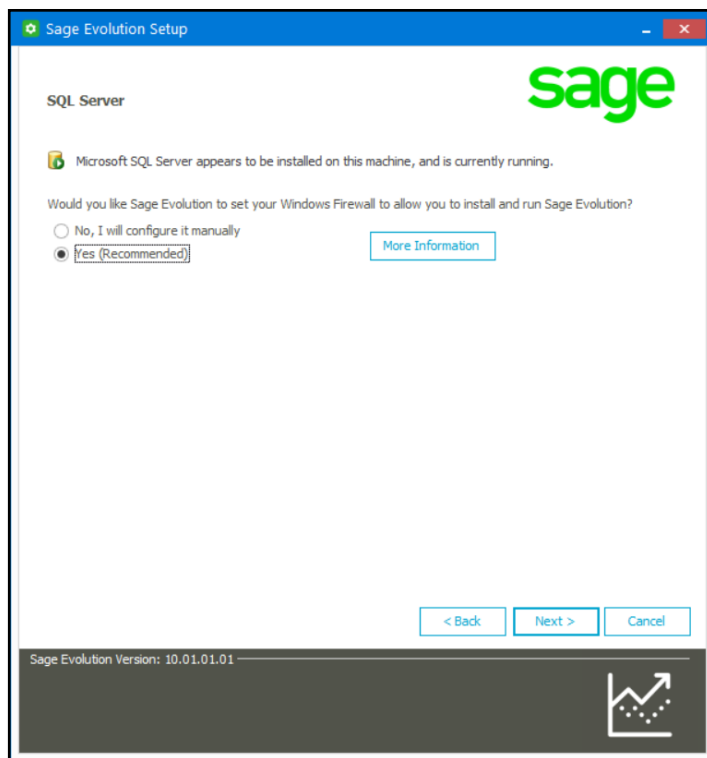
Custom:

Select this option if you want to select only specific modules/features to be installed on the PC.

Please note, the selection of this option should also result in the **DBScripts** sub-folder to be created in the installed Evolution folder. This is an ideal option for installing on the main Evolution server PC as opposed to the Complete option, especially if you don't want all the add-on modules and features to be installed.

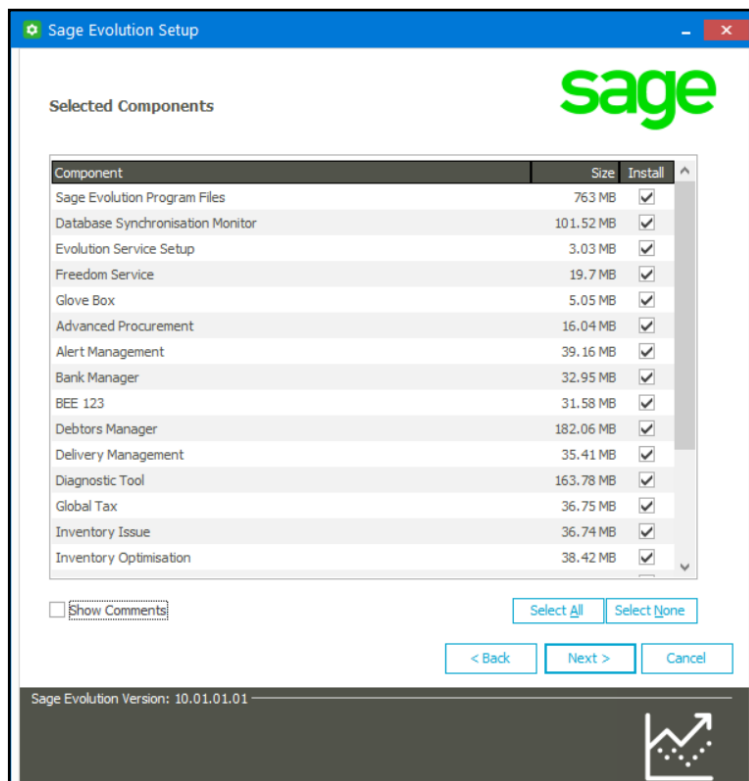
This means the user of the PC where this option is selected should also have database administration capabilities: company creation, upgrading and/or copy company.

8. On the following screen that opens, click on the **Yes (Recommended)** option below and then the **Next** button at the bottom of the screen.



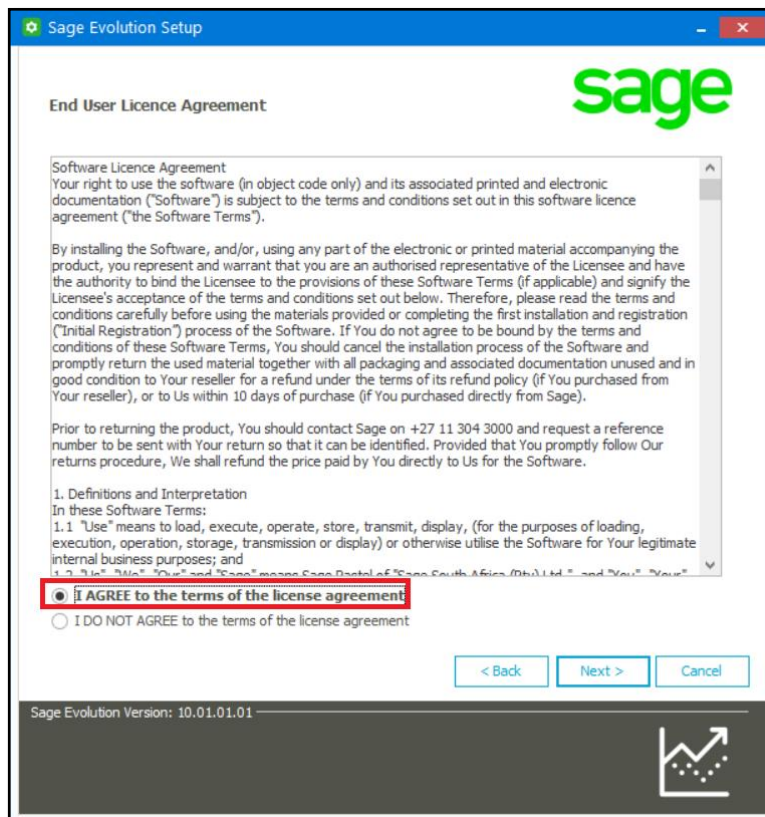
9. If the **Custom** option was selected in step 7 above, then the screen below should now be displayed.
10. Remember, the main difference between the **Complete** or the **Custom** installation options: This depends if you require all modules/features (Complete option) or only specific modules/features (Custom) to be installed.
11. Therefore, select all the relevant options below that need to be installed, with at least the Sage Evolution Program Files option (compulsory) that must be installed for

Evolution and its core modules (e.g. Customers, Suppliers, Inventory, General Ledger etc) to be installed.

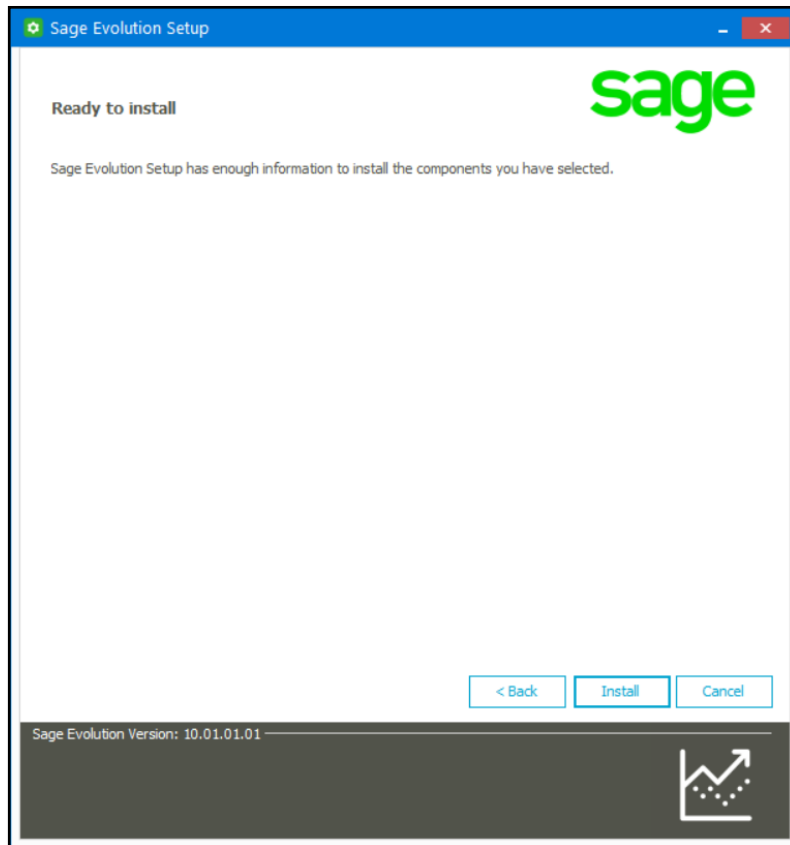


12. When done, click the Next button above.

13. Click the **I agree to the terms of the licence agreement** option and the Next button below.



14. When done, click the **Install** button below to start the installation.



15. If successfully installed, the following message should display. Click the **Finish** button to continue.

