

Freedom Service Setup Guide

Overview

The Evolution Freedom Service is a Sage developed, Microsoft Windows Service application type to enable working with the **My Dashboard-** (to display user selected information in visual and interactive graphs), as well as the **Central Search** (Internal company wide search facility for any records) features to work as expected.

By setting up the Freedom Service on the Evolution server, an interactive connection between Sage Evolution and the SQL Server company database is enabled and thereby allowing all workstations to access the above-mentioned features.

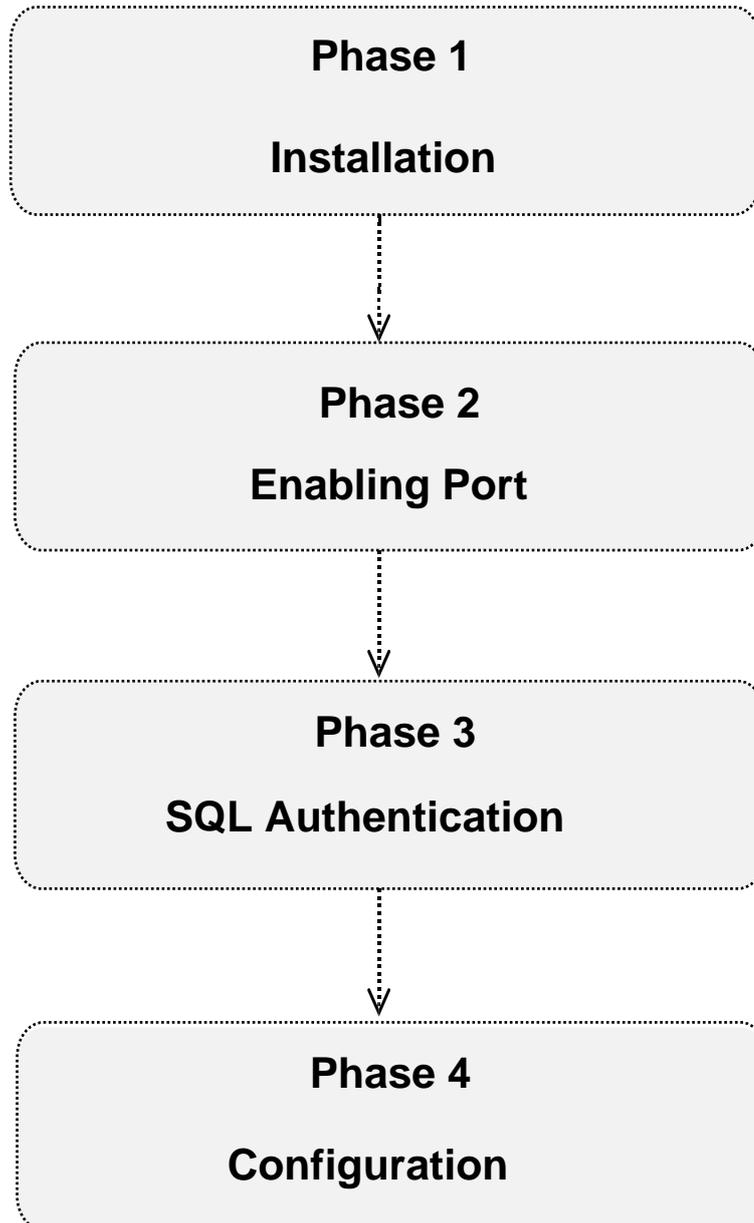
Definition: Microsoft Windows Services

Microsoft Windows services, formerly known as NT services, enable you to create long-running executable applications that run in their own Windows sessions.

These services can be automatically started when the computer boots, can be paused and restarted, and do not show any user interface.

Set up Procedure

Apply the following roadmap to ensure a successful Freedom Service setup:



Phase 1 – Installation

The first step in the Freedom Service setup is to install it.

Also note the Freedom Service only needs to be installed on the main Evolution Server PC and not on each workstation as well.

Apply the steps below to install the Freedom Service

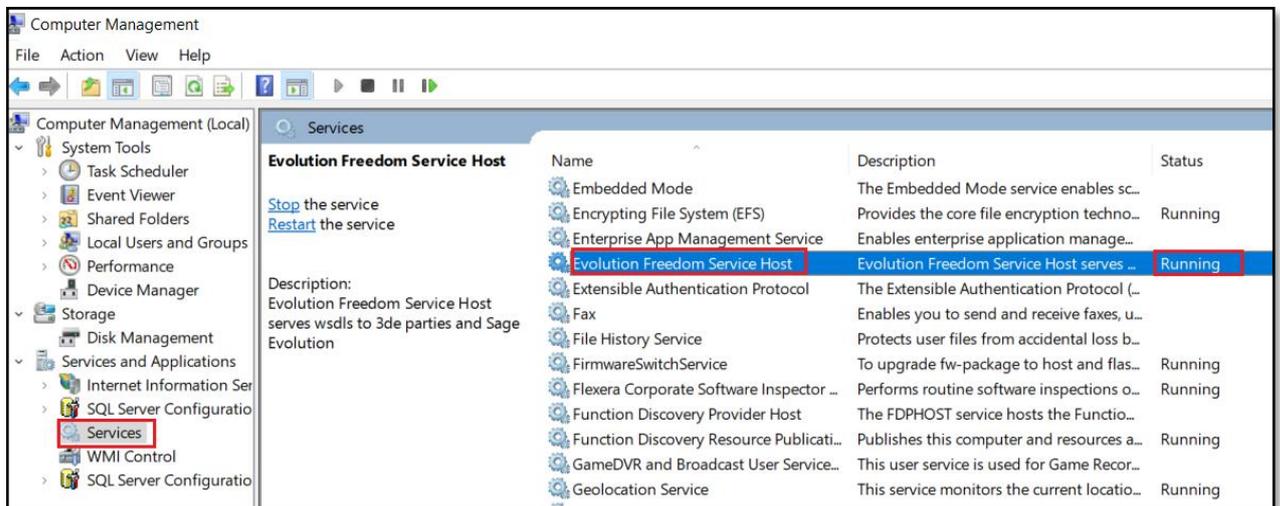
Please note: The steps below assume Evolution and the other modules are already installed on the Evolution server PC.

If the Freedom Service has already been installed on the Evolution Server PC **for the current Evolution version**, then skip Phase 1.

If Evolution is not yet installed, refer to the attached Evolution install guide called **INSTALLING SAGE EVOLUTION PROCEDURE**

Do the following to check if it's already installed:

1. Go to **Computer/This PC | Manage | Services and Applications | Services**.
2. Check if the **Evolution Freedom Service Host** is listed below and with a **Running** status.
3. If not currently running, right click on, and restart it.



Apply the following steps to install the Freedom Service

1. Locate the **Setup.exe** file on the Evolution installation directory and double click on this file to start the installation process.

2. Consider and apply the recommended steps stipulated below.



3. Click **Next** at the bottom of the screen above when done.
4. In the next screen that opens below, complete the fields according to your details and requirements.

Please note the following:

Destination Folder:

As only Freedom Service is going to be installed in this case (if not yet installed), then simply ensure the **Destination Folder** address is the same as the currently installed Evolution directory.

In this case, Evolution has already been installed to the folder location marked below.

The screenshot shows the Sage Evolution Setup window. The title bar reads "Sage Evolution Setup". The Sage logo is in the top right corner. The window is divided into three main sections: "Customer Information", "Destination", and "Shortcut".

- Customer Information:** Includes fields for "User Name" (filled with "Bennie") and "Organisation" (filled with "Benco").
- Destination:** Includes a "Destination Folder:" field (highlighted with a red box) containing "C:\Program Files (x86)\Sage Evolution 10.1". Below it is a checkbox "Always check this location for newer versions of Sage Evolution" (unchecked) and another folder path "C:\OPERATIONAL\INSTALLS\Evolution.10.1.0.145.Beta.Full\".
- Shortcut:** Includes a checked checkbox "Create shortcuts in Start Menu folder:" with a text field containing "Sage Evolution 10.1". It also has a checked checkbox "Create shortcuts on Desktop" with radio button options: "Only for me (Bennie.Pienaar)" (selected) and "Anyone who uses this computer (all users)".

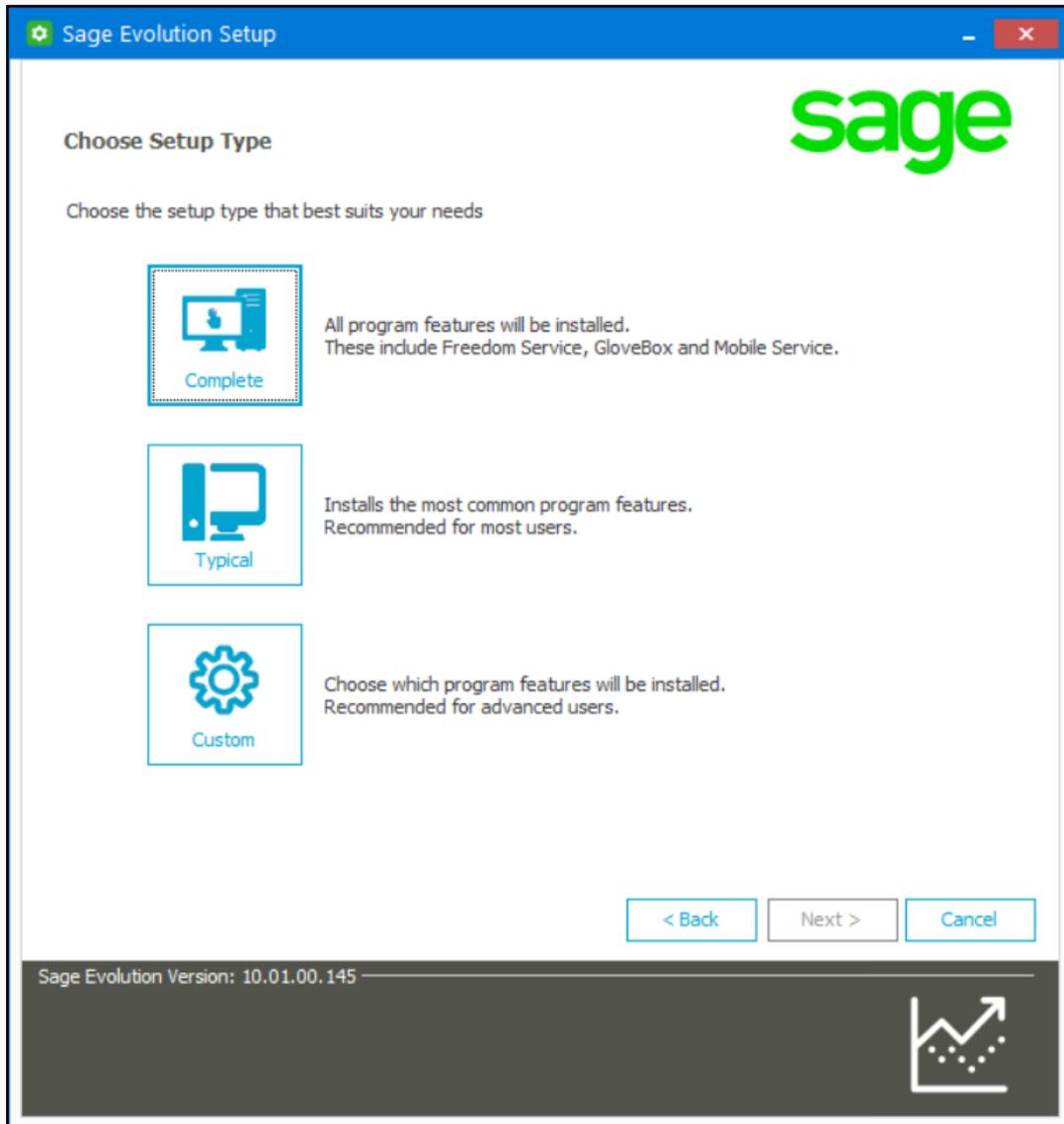
At the bottom right are buttons for "< Back", "Next >", and "Cancel". At the bottom left, it says "Sage Evolution Version: 10.01.00.145". At the bottom right is a line graph icon.

Also note:

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

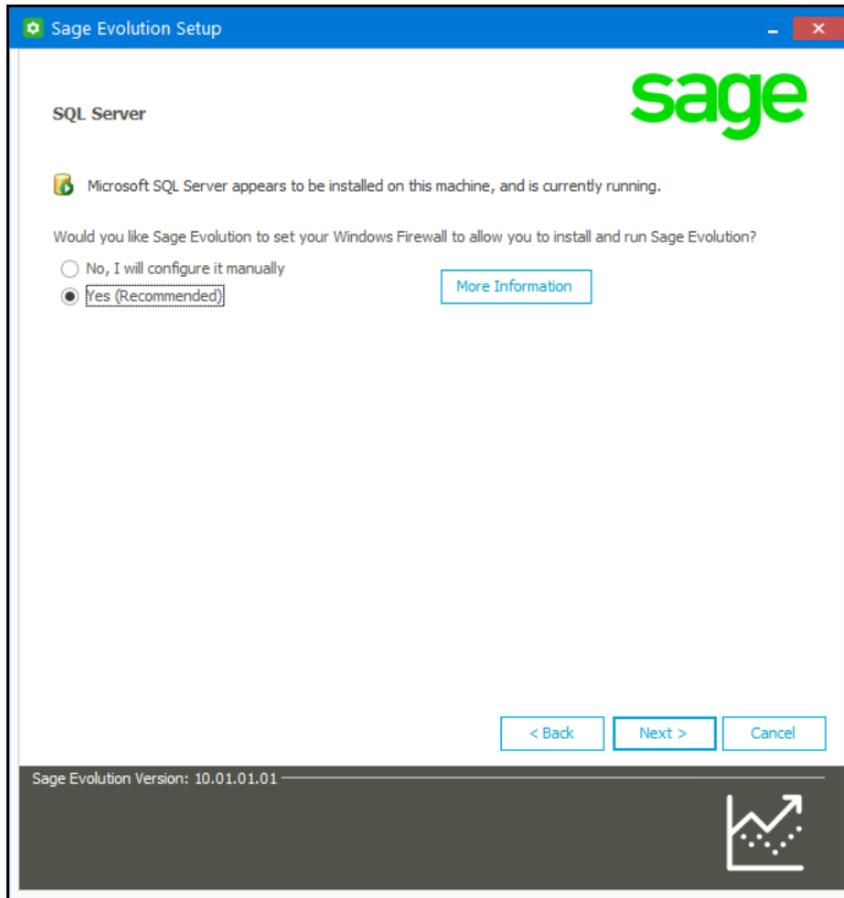
In that case, browse for and specify the relevant folder name in which the Freedom Service needs to be installed in, as can be seen below (and not just **Sage Evolution**).

5. When done, click the **Next** button above.
6. Consider the 3 main installation options below by considering the comment next to each option.

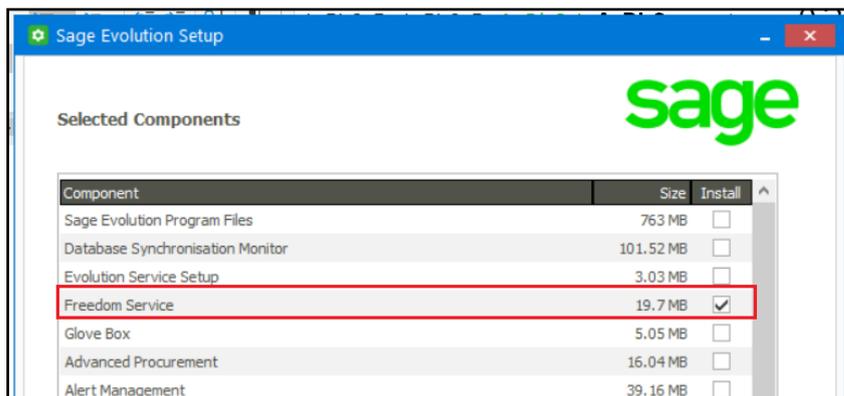


7. In this case select the **Custom** option above and then click the **Next** button at the bottom of the screen.

- Click the **Yes** option below and the **Next** button at the bottom of the screen.

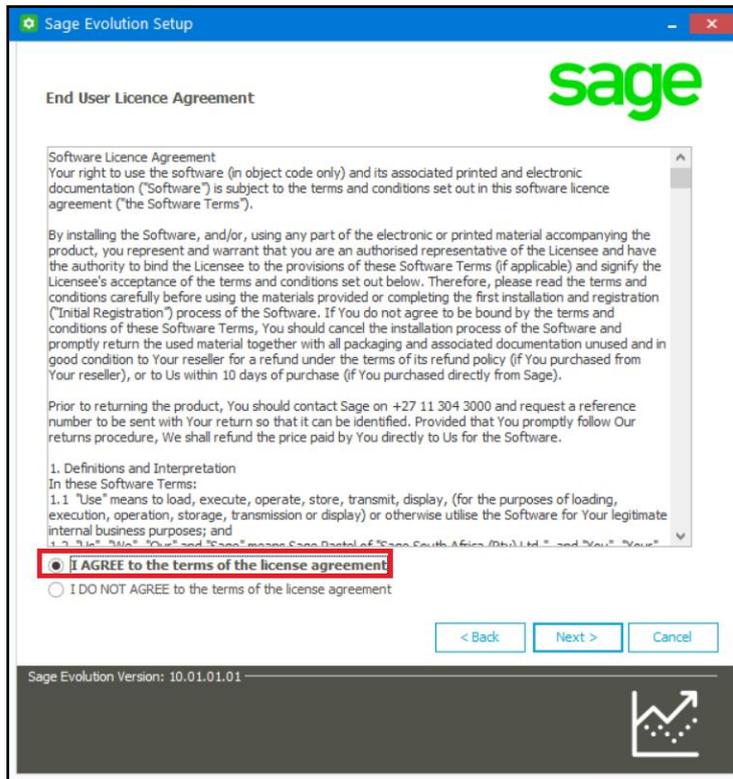


- In this case (of only having to install the **Freedom Service**), select **only the Freedom Service** option below.

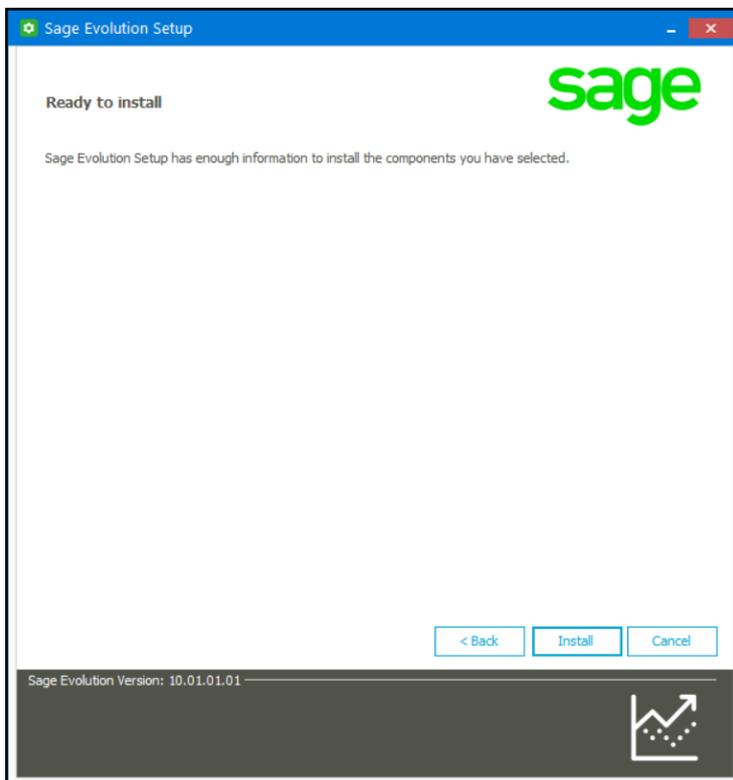


- When done, click the **Next** button at the bottom of the screen.

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

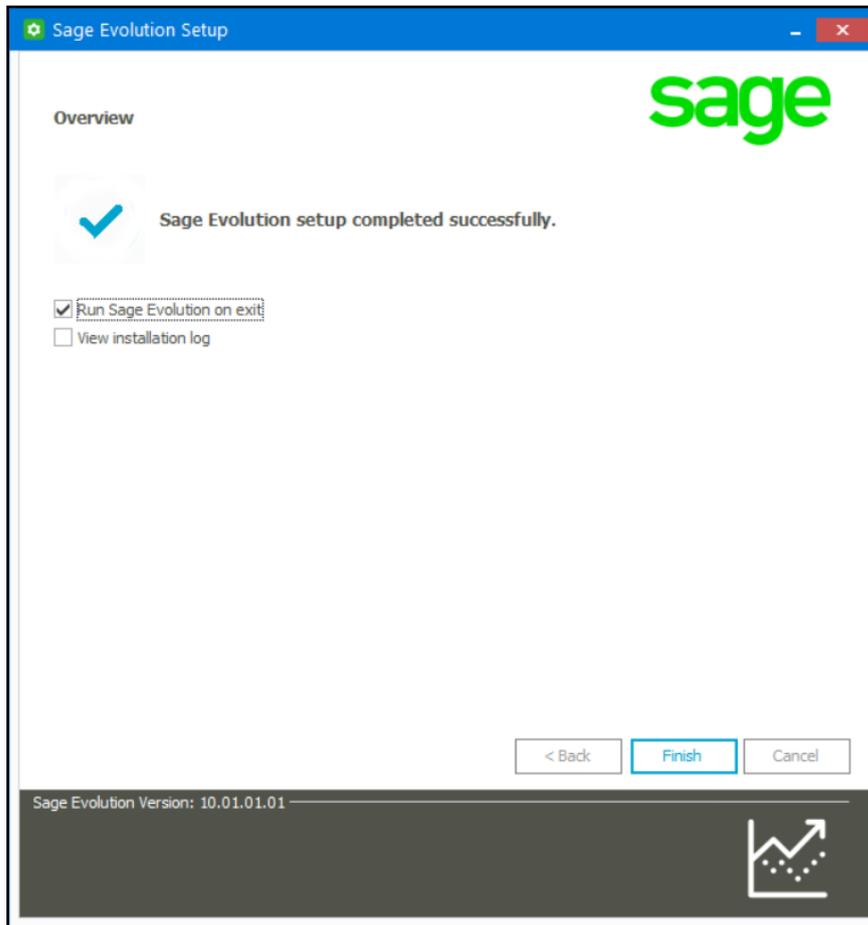


12. When done, click the **Install** button below to start the installation.



13. If successfully installed, the following message should display.

14. Click the **Finish** button to continue.



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.

Phase 2 – Enabling Port 5000

For the Freedom Service to establish a connection between all network components, it's essential to enable a specific HTTP port (5000) on the Windows Firewall of the local PC where Freedom Service is installed **as well as** on all workstations.

Access the **Windows Firewall** in the Control Panel. To create these new rules, go to **Advanced Settings** and add the port (see below for more details) on **both** the **Inbound** and **Outbound Rules** options.

Important Information

Please consult with your network administrator for assistance 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 (in addition to all workstations' local Windows Firewall)

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

Property:	Details:
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
Port Orientation:	Both the Inbound and Outbound ports should be enabled.

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

Phase 3 – SQL Configuration settings

For the Freedom Service to establish a connection between the company and all related components, the correct settings on the selected **Authentication Method** should be configured. The Authentication Method applies to the communication link between your Sage Evolution company database and the SQL Server instance.

Microsoft SQL supports two authentication methods. Find below more details on the two available options:

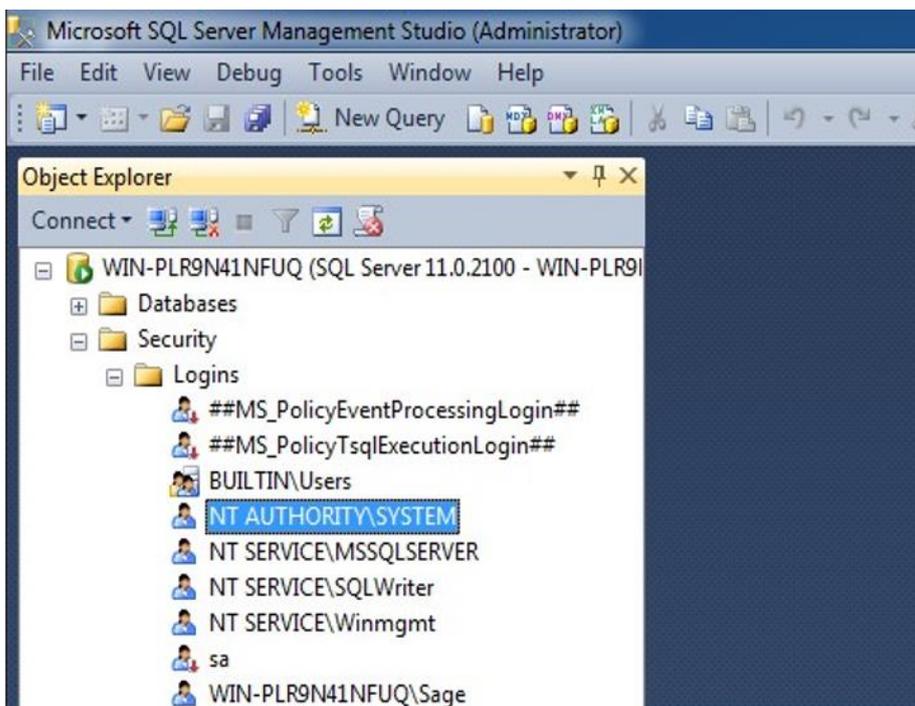
a) Windows NT Authentication Trusted Connection

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

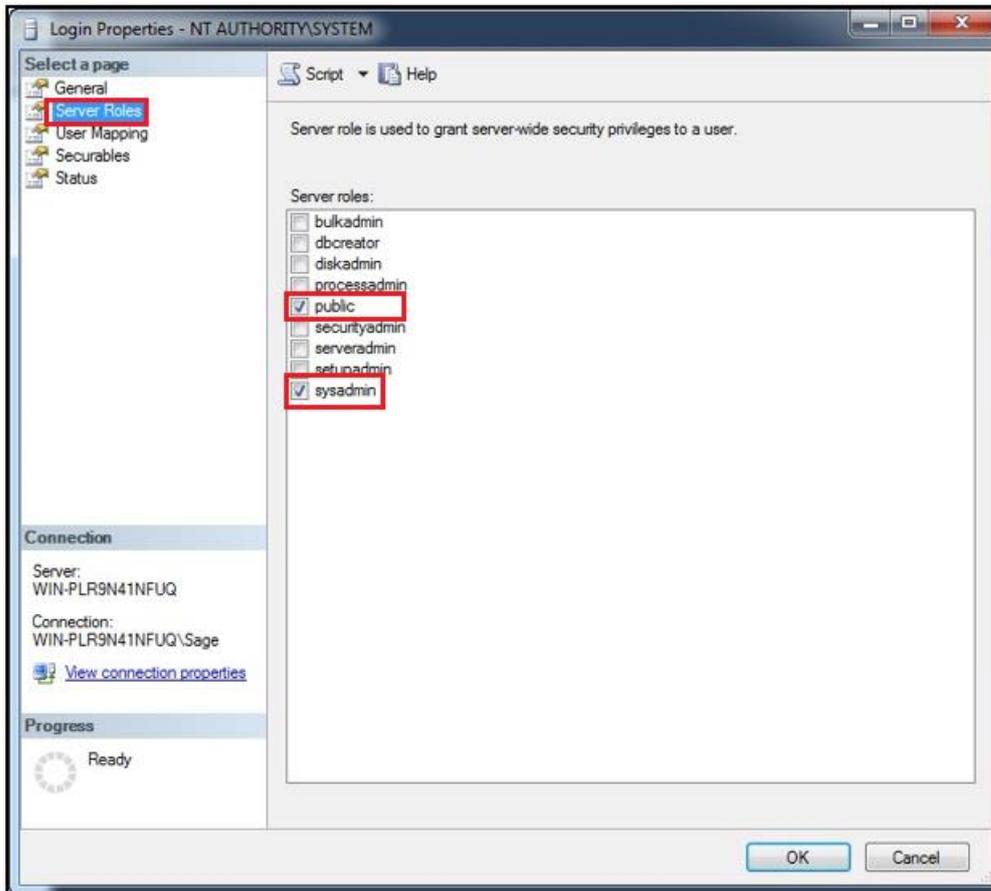
If you are using **Windows NT Authentication**, ensure that the **sysadmin** server role has been enabled for the **NT AUTHORITY\SYSTEM** user.

Apply the following steps to check whether the required Server Role has been enabled,

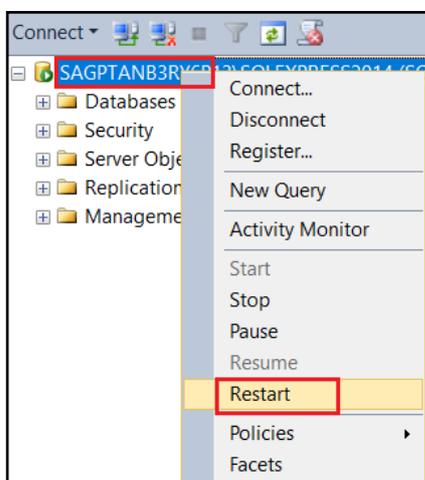
1. Open **Microsoft SQL Server Management Studio** on the SQL server PC (and where also the Freedom Service is installed on).
2. Expand the **Security | Logins** folder and locate the **NT AUTHORITY\SYSTEM** object.



3. Right click on **NT AUTHORITY\SYSTEM** and select the **Properties** option.
4. Select the **Server Roles** page option and ensure that the **sysadmin** and **public** options have been selected.



5. When done, click on the **OK** button to save changes.
6. Finally, ensure all users are logged out of all companies and then restart the MS SQL Engine.



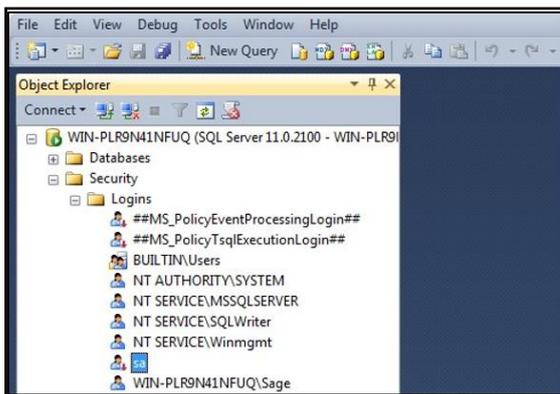
b) MS SQL Server Authentication

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 the Evolution company (a SQL Server) database the selected SQL user's (usually user **sa**) and its own password provides the authentication.

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

Apply the following steps to check whether the required Server Role has been enabled,

1. Open **Microsoft SQL Server Management Studio** on the SQL server PC (and where also the Freedom Service is installed on).
2. Expand the **Security | Logins** folder and locate the built in SQL **sa** user.
3. The screen displays as follows:



4. Right click on the **sa** user select the **Properties** option
5. From here apply steps 4 to 6 above.

Important Information

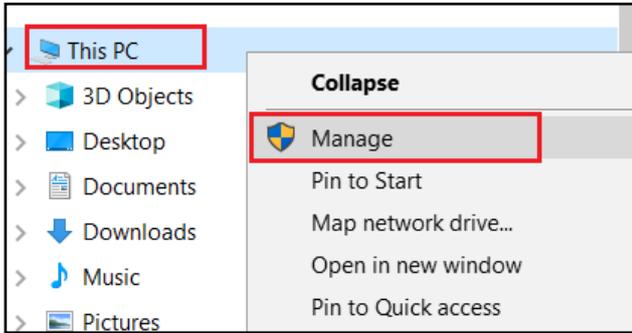
The selected authentication for the Freedom Service above must correlate to your SQL Database authentication.

Consult with your IT administrator if you are unsure of your current database authentication method.

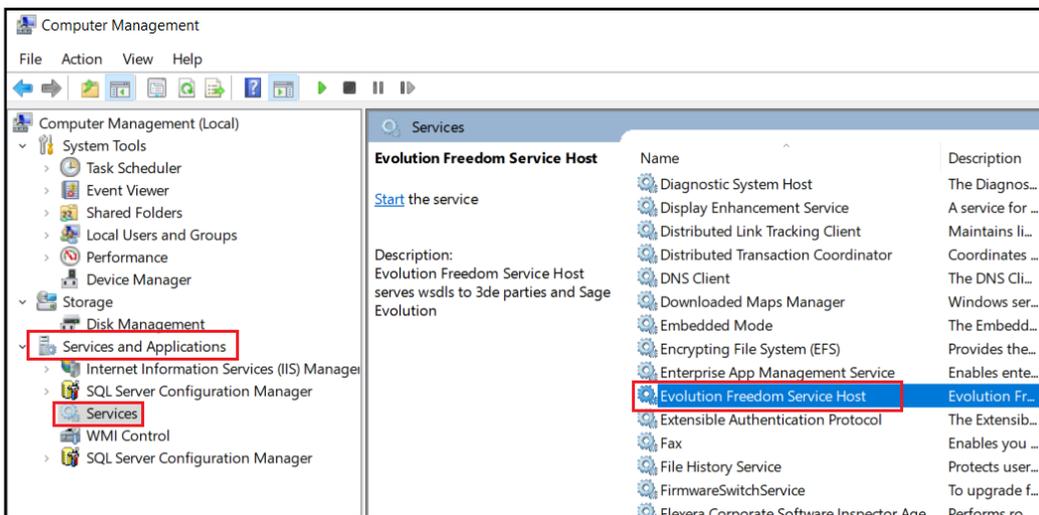
During the new company creation process, the authentication method defaults to Windows Authentication but when a company is located (or current located company edited by the user) it can be changed between the SQL- or Windows Authentication methods.

6. Finally, restart the Evolution Freedom Service by doing the following:

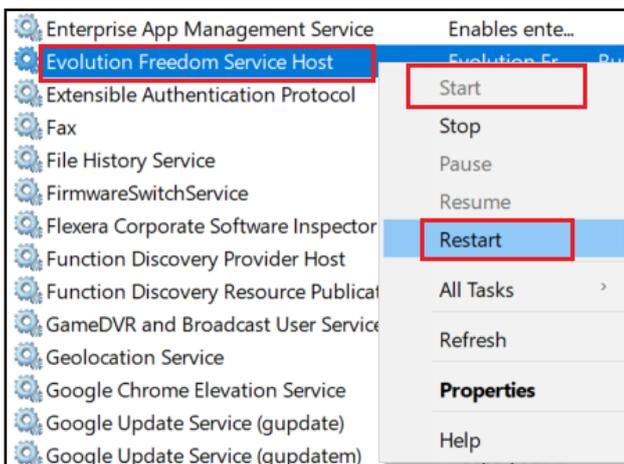
- a) On the PC where the Freedom Service is installed, go to This PC (or Computer) | Manage



- b) In here, go to **Services and Applications | Services** and then find the **Evolution Freedom Service**



- c) Right click on the Evolution Freedom Service and **Restart** it. Else, if **Restart** it not available, select the **Start** option.



Phase 4 - Configuration

You can now configure both the **Freedom-** as well as the **Failover Service** in the Evolution company.

Apply the following steps to achieve the above outcome:

1. Login to the company with agent Admin.
2. Navigate to the **Administration | System Configuration | System Wizard | Services** tab.
3. In here click the **Auto Locate** button.

The screenshot shows the 'System Configuration Wizard' window. On the left sidebar, the 'Services' tab is highlighted with a red box. The main content area is titled 'Freedom Service' and contains the following text: 'Please select the System wide default Freedom Service. For the Failover Service please indicate to use a local service or point to the server that will host the failover service. e.g. (http://localhost:5000/freedom.core/)'. Below this text are two dropdown menus: 'Freedom Service' and 'Failover Service'. The 'Failover Service' dropdown has a radio button selected for 'Use local service'. At the bottom right of the main content area, there are two buttons: 'Clear' and 'Auto Locate', with the 'Auto Locate' button highlighted by a red box. Below the main content area, there is a 'Session Timeout' section with a spinner box set to '20' and the label 'Minutes'.

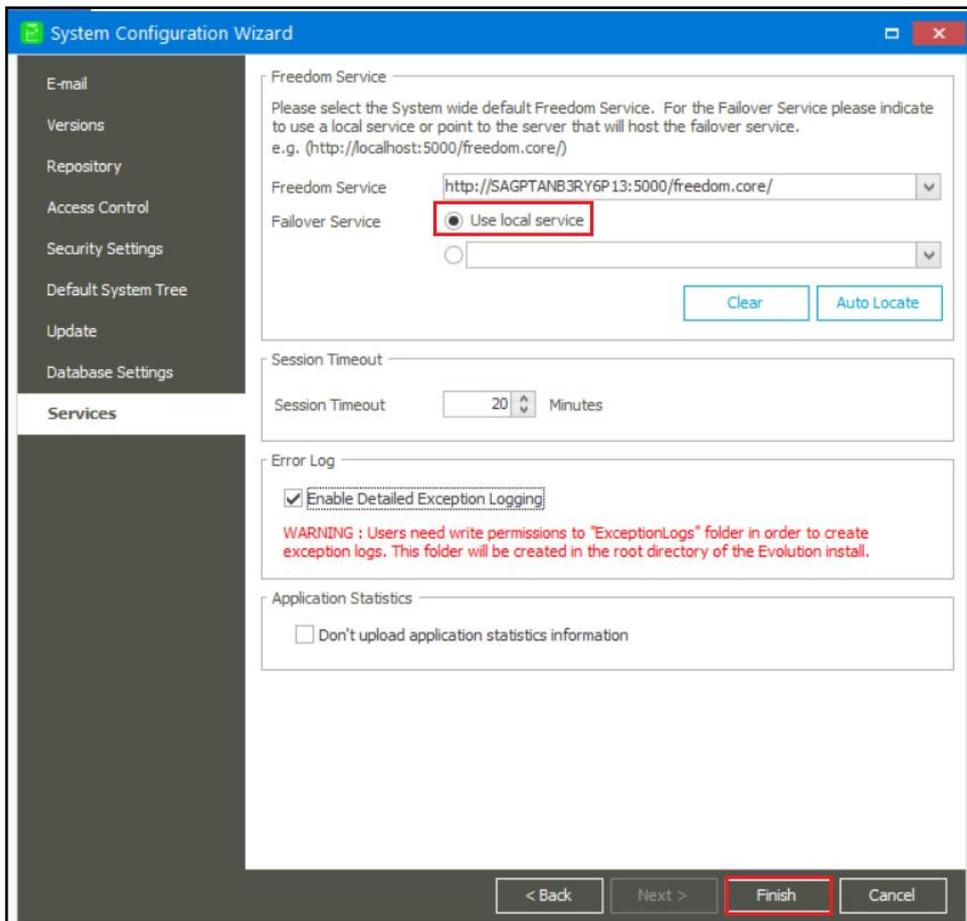
4. Notice how the Freedom Service field populates below.

This screenshot shows the same 'System Configuration Wizard' window. The 'Freedom Service' dropdown menu is now populated with the URL 'http://SAGPTAN13:5000/freedom.core/', which is highlighted by a red box. The 'Auto Locate' button is now disabled and has a greyed-out appearance. The 'Failover Service' dropdown menu remains empty, and the 'Use local service' radio button is still selected.

- From the above, notice the following format that can be manually captured if, for any reason, the above field doesn't auto populate.

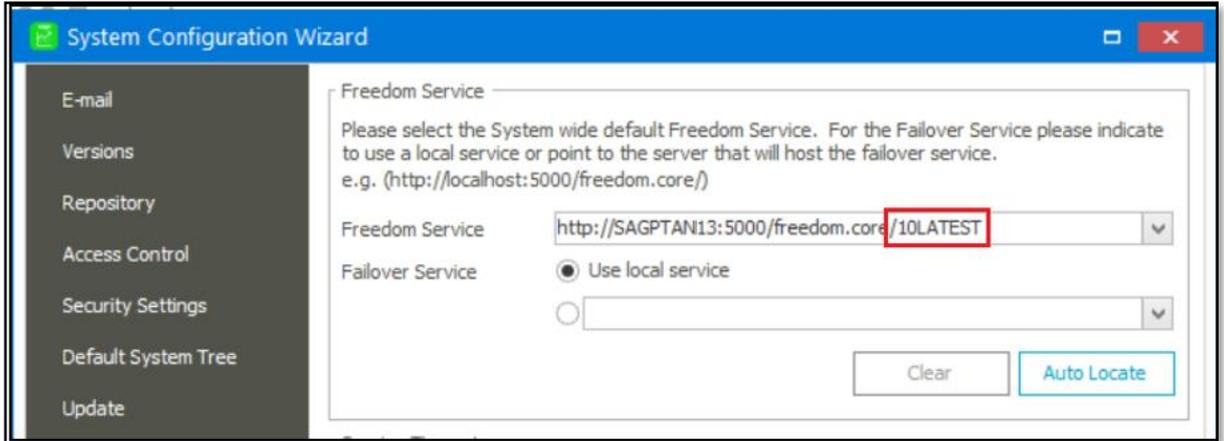
PHRASE	MEANING
http://	The opening phrase always start with http://
SAGPTAN13	The PC name where the Freedom Service is being accessed from
:5000/freedom.core/	The standard closing phrase. In here notice the port 5000 as mentioned above. Please keep it unchanged.

- For now, keep the selection on the **Use local service** option and then click the **Finish** button at the bottom.



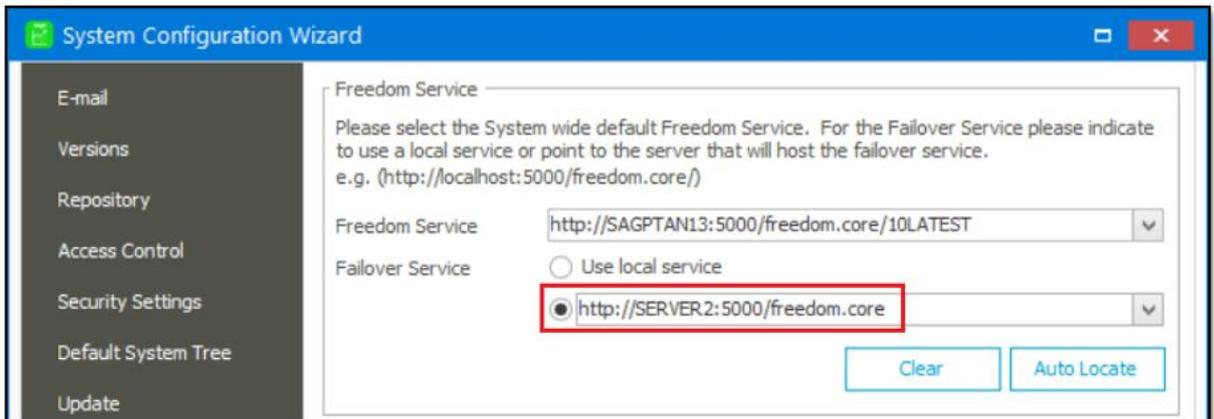
- Reopen the same Evolution company and go back to the **Administration | System Configuration | System Wizard | Services** tab.

- In here you should now notice that the currently logged in company database name has been added to the end of the Freedom Service field value.



- If for any reason the server PC on which the Freedom Service is installed and accessed from, you can also make use of the **Failover Service**.

Therefore, if necessary, on the Service tab, simply enter the name of the relevant sever PC name and the rest of the standard Freedom Service value as can be seen in the required format below.



- When done, click the **Finish** button again at the bottom to save the changes.
- When any user now logs into the company they will be able to use the Central Search, My Dashboard and Alert Manager Mobile features in the company.

Troubleshooting

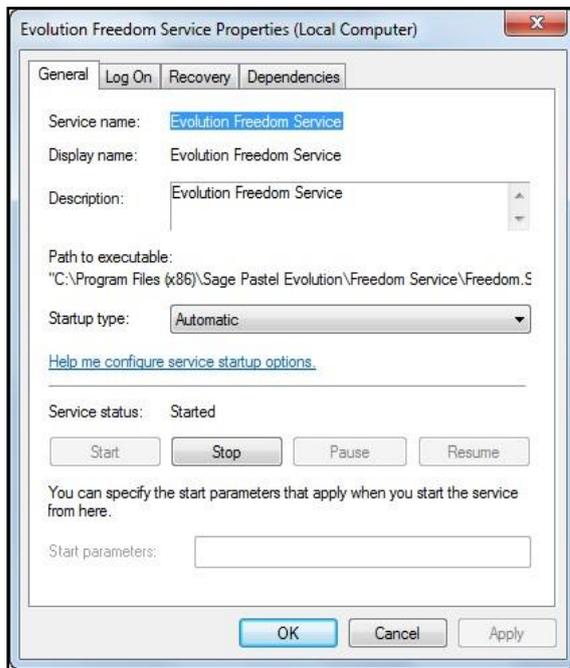
When attempting to connect with the Freedom Service by clicking the Finish button at the bottom of the Services screen, one of the following status / error messages may display. The table below contains solutions to apply in order to resolve the issue.

Message	Solution
'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 i.e. invalid username / 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.
'An attempt was made to access a socket in a way forbidden by its access permissions'	This error may be due to a local VPN connection on the local PC blocking the proper connection to the Freedom Service, perhaps also as a result of port 5000 being blocked. Therefore, please consult with your local IT technician to help resolve this matter

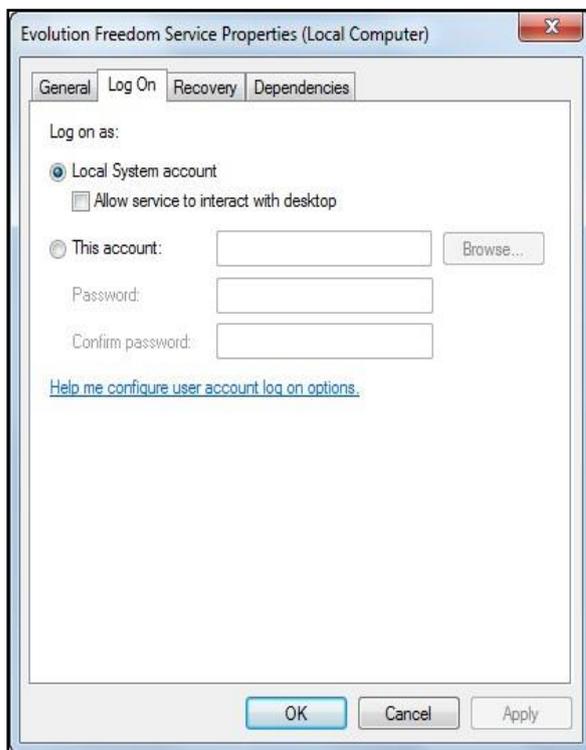
If the connection still fails or if any of the features depended on the Freedom Service are not functioning, make sure that your Windows user has access / permission to the Freedom Service.

Also apply the following steps:

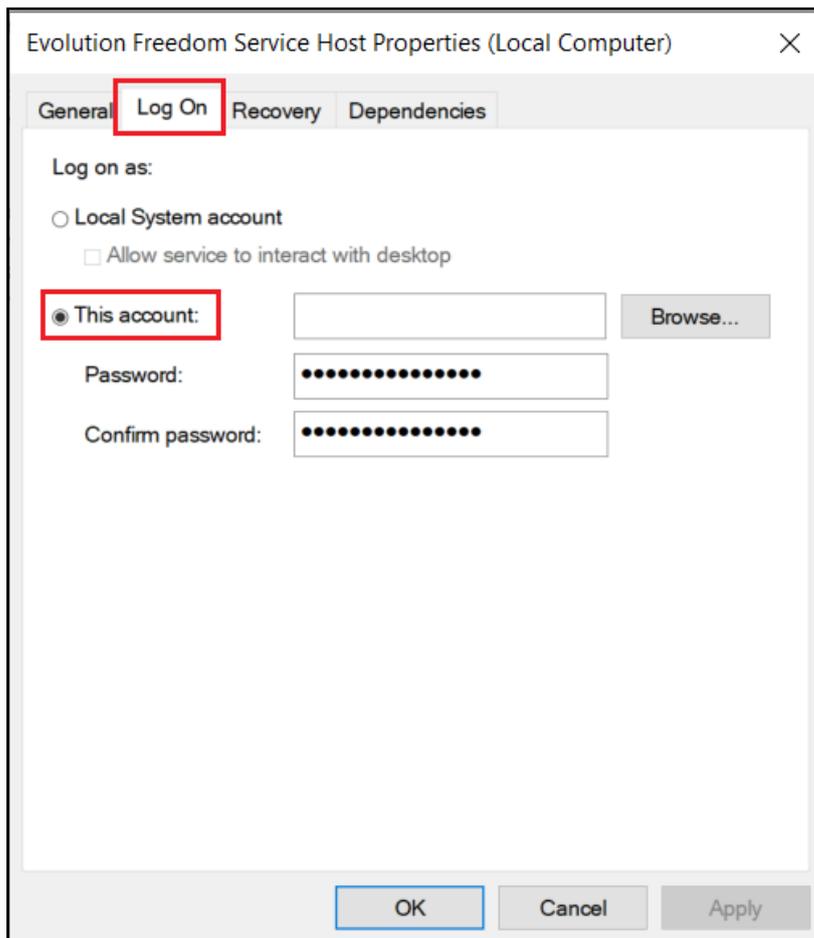
1. Access and open the Evolution Freedom Service as explained in Phase 3, Step 6 above
2. Double click the **Evolution Freedom Service** | right click **Properties**. The screen below should now display:



3. Click on the **Log On** tab.



4. Instead of using the **Local System account**, select the **This account** option above and enter the required account details.
Also click on the **Browse** button to locate the required user account, and then enter the password into the **Password** and **Confirm password** fields.



5. When done, click the OK button to save changes made to the service properties.
6. Finally, restart the **Evolution Freedom Service** for the changes to take effect.