

Naming the policy

The General tab of the Backup Policy wizard allows you to specify the basic properties of the backup policy.

Why should you specify a name or description?

SQL Safe requires that you enter a unique name for each policy. Both the name and description will appear in the status messages for your policies. Using a meaningful name and description allows you to easily identify problems when they occur. For example, consider specifying a description that will help you later choose the correct backup to restore during a disaster recovery situation.

 When supplying a name and/or description, do not end with the backslash (\) character.

Which format should you choose to perform your backup?

Depending on the backup policy you are creating choose the backup policy format you need. This section provides you two options, ".safe" and ".bak".

 For native backups use ".bak" format. Use ".safe" format for other backup policies, this format is selected, by default.

Which policy action should you choose?

Choose the action that best reflects how you want to use this policy. You can create a backup policy to monitor and manage your backup jobs or just monitor them. According to your requirements, you can select from one of the following options:

- Monitor and automatically create backup jobs using the SQL Server Agent
- Monitor and automatically create backup jobs using the SQL Safe Backup Agent
- Monitor only

The third option creates the policy only to monitor database backups and no jobs are created. By default, SQL Safe will monitor the status of any backup operation that meets the criteria of your policy.

 Note that SQL Server Express does not support the SQL Server Agent. Use the second option if you add any instance with SQL Server Express in your policy. This option allows the SQL Safe Backup Agent (second option) to create your policy backup jobs.

 If you choose to use the SQL Safe Backup Agent, policy data files will be stored by default at C:\Program Files\IDERA\SQL Safe\PolicyData. You can change these settings by going to the **Administration** tab, selecting the **General Preferences** option, and typing the preferred folder directory in the **Policy Data** tab.

After defining your setting in this tab, click **Next** to [Select your databases](#).

SQL [Safe](#) is a high-performance backup and recovery solution for your SQL Servers. [Learn more >>](#)

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