

View your Managed Instances

The **Instances** tab allows you to view all instances managed in your environment. For each instance, you can see the following information:

- **Status** - displays the status of the respective instance. The error icon means the connection to the instance failed. The up icon represents a successful connection with the instance.
- **Instance name** - the name of the respective SQL Server instance.
- **Status text**- specifies in detail the status of the SQL Server instance.
- **# of Databases** - displays the number of databases that belong to the respective instance. Click this option and SQL Safe takes you to the **Databases** tab filtered by the selected instance.
- **# of Policies** - shows the number of policies that cover at least one database that belongs to the respective instance. Click this option and SQL Safe takes you to the **Policies** view filtered by the selected instance.
- **# of Operations**- displays the number of operations in the instance. Click this option and SQL Safe takes you to the **Operation History** tab filtered by the respective instance.
- **SQL Server version**- displays the SQL Server version of the instance
- **Actions**- under this column you can find the gear icon with the following options for your instances: Remove/delete, Change Credentials, Perform Operation ([AdHoc Backup](#), [AdHoc Restore](#)), Create Policy ([Backup](#), [Restore](#), [Log Shipping](#)), and Install SQL Safe Backup Agent (if relevant).

Keep in mind:

- You can sort the information available on this tab by clicking the column header by which you want to order your instances.
- You can set the number of items you want to view per page by going to the lower section of the list grid, type a number in the box, and the page will be updated according to your requirements.

How do you filter the information on your Instances tab?

SQL Safe allows you filter your information to access your required data easily. Go to the left section of the **Instances** tab and filter according to:

- **Status**- you can select **Ok** or **Error**.
- **Instance name**- type the name of the instances you want to view.
- **Status text**- type an specific status.
- **# of Databases**- use the **From** and **To** options to specify a range of the number of databases for which you want to see your data.
- **# of Policies**- use the **From** and **To** options to specify a range of the number of policies for which you want to see your data.
- **# of Operations**- use the **From** and **To** options to specify a range of the number of operations for which you want to see your data.
- **SQL Server version** - type a SQL Server version for which you want to see its instances.
- **Policy Name** - type the name of the policies for which you want to view their respective instances.

✓ When using filters take into account:

- You can save your filtering options by selecting your filters, typing a name in the **By Custom Filter** field, and clicking **Add Filter**. To retrieve your saved filters, click the drop-down option in the **By Custom Filter** section and select your filter name.
- If you want to select filters first and apply the changes later, deselect the **Apply filter as it changes** option.
- To remove filters, use the specific **Remove Filter** option in each filter. For example, if you want to remove your Status filters, click **Remove Status Filter** under the same filter section.
- Under **APPLIED FILTERS** on the top section or your **Managed Instances** tab, you can see the filters you have selected. Click the **X** icon next to the ones you want to remove.
- Use the option **Clear** on the top section of the **Filtering** section to remove all filters.

What other options are available on the Instances view?

On the upper section of your Instances list, you can find the following options:

- **Add instance**- You can register SQL Server instances to your monitored environment. Go to [adding SQL Server instance](#) for more information about registering new instances.
- **Create Policy**- use this option to create a [backup](#), [restore](#), or [log shipping policy](#).
- **Backup** - use this option to open the [Backup Wizard](#).
- **Restore**- use this option to open the [Restore Wizard](#).
- **Export** - you can export the information displayed on your **Instances** view. Select your preferred format: PDF, XLS, or XML.

⚠ Take into account that these options are not available for **Guest** users.

What actions can you perform on instances?

You can select one or more instances from the **Instances** tab, click one of the respective  gear icon under the **Actions** column, and perform any of the following actions:

- **Remove/delete**- use this option if you no longer want to manage the selected instances.
- **Properties**- use this option to edit general and advanced properties of a registered Instance.

The General tab, allows you set different credentials to connect to the SQL Server Instance. Go to [add new SQL Server instances](#) to find more information about the credentials needed to monitor an instance.

The Advanced tab, allows you specify a Network Name to connect to the SQL Server Instance and/or the SQL Safe Agent Components.

- **Perform operations**- select this option to access any of the following operations:
 - **AdHoc Backup** - select this option to open the [Backup Wizard](#) with the selected instances and specify the respective settings for the backup.

- **AdHoc Restore** - take into account that this option is only available when you select a single instance. SQL Safe opens the [Restore wizard](#) so that you can specify the respective settings for the restore operation.
- **Create Policy** - use this option to create a [backup](#), [restore](#), or [log shipping policy](#).
- **Install SQL Safe Backup Agent** - This option lets you install the SQL Safe Backup Agent in the server hosting the selected instance.

 Take into account that these options are not available for **Guest** users.

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