Name the policy

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

Why should I specify a name or description?

You are required to 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 will allow you to more 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.

Which policy action should I choose?

Choose the action that best reflects how you want to use this policy. You have multiple options in this section:

- 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 first option allows you to create the policy for monitoring database backups and automatically creates the backup jobs using the SQL Server Agent on your SQL Server instances. Creating jobs allows to enforce consistent backup settings across your environment.

The second option allows you to create the policy for monitoring database backups and automatically creates backup jobs using the SQL Safe Backup Agent which is in charge of executing and scheduling these policies.

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. As a result, you must 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 **Policy Data** tab on the Management Console Preferences and selecting or creating the folder directory where you want to store these files.

SQL Safe is a high-performance backup and recovery solution for your SQL Servers. Learn more > >

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