

Add a server automatically

The following information describes how to quickly add a server to the backup manager so you can start a backup as soon as possible. After you log in to Server Backup Enterprise for the first time, the **Add a Server** button displays in the *Dashboard* section. Click this button to open the Add Server Wizard.

The Wizard guides you through all necessary settings across the application in order to configure a backup task for your Server. Once you have completed all of the steps in the Wizard, you will be able to start a backup task for the Server.



Video

To watch a video explaining how to quickly add a server to the Backup Manager using the Add Server Wizard, [click here](#).

The Add Server Wizard is designed to simplify the experience of the following:

- Adding a Server
- Installing a Backup Agent
- Creating a Volume
- Creating a Disk Safe
- Creating a Policy for the new Server

Additionally, it also reduces the flexibility given to the user in terms of the Volume, Disk Safe, and Policy settings.

Screen 1 - Choose a Server

The first screen allows you to specify options related to the **Server** you are going to back up.

1. You can back up any machine available via the local network or Internet, or you can back up the Server Backup machine itself.

1.1 Enter the **Host Name** or **IP** for the Server you are going to back up.

2. The **Backup Agent** software is required to be installed on each Server you want to back up.

2.1 Carefully read all the information displayed in this window during the process. You can also hover your mouse pointer over the information sign for additional useful information.

2.2 Make sure the **Deploy agent software now** check-box is selected.



Tip

You can deselect the "Deploy agent software now" check-box if you have already installed it. In this case, the "Administrative Credentials" area will disappear.

2.3 Fill in the **Username** and **Password** fields to specify the administrator's username and password for accessing the Server and installing the Agent software.

3. By default, the "**Reboot server after deployment**" option is disabled. If you decide to select this option, then the Server will be rebooted at the end of the agent deployment.



Notice

No backups can take place until the reboot occurs.

4. Click **Next**.

5. The verification process will start. If there are no errors, you will see the following message. Click **Close** to proceed.

Screen 2 - Choose Backup Storage

In this step, you choose where to store your backups and specify the compression and encryption types.

Selecting Volume Name and Location

1. Your backups will be kept on your Server Backup machine on one of the physical disks.

1.1 Choose any of the available **Disks** on your Server Backup machine to create a backup storage on.

2. **Volumes** are containers of your backed-up data. Physically, this is a folder on your hard drive. You can leave the default options for the Volume or specify your custom ones.

2.1 You can specify a **Folder** to put the Volume into. For example, if you enter "My_Volumes" as the folder name, the path will be "D:\My_Volumes\Volume 1."

2.2. The **Volume Name** is assigned automatically. You can change it if necessary.

Configuring Compression and Encryption

1. **Compression** is a reduction in data size to save disk space or transmission time.

1.1 By default, the **Compress Backups** option is enabled. It allows you to use compression.

1.2 Specify the **Compression Level** using the slider:

- **Fastest** - This level is used if the most important factor is the amount of **time** required for the compression operation. In this case, the **QuickLZ** compression type is used. Read more in [QuickLZ compression](#).
- **Most Compression** - This level is used if the most important factor is the **final size** of the compressed file. In this case, the **ZLib High** compression type is used. Read more in [Zlib compression](#).



Note

Note that the higher the compression level is, the slower your backup process will be.

2. **Encryption** allows you to securely protect data that you don't want anyone else to have access to.

2.1 If encryption is necessary, select the **Encrypt backups** check-box.

2.2 Enter the **passphrase** and confirm it by entering exactly the same phrase. A **passphrase** is similar to a password in usage, but is generally longer for added security.

3. Click the **Save** button.

Specifying Quotas, Adding Users and Groups

Click the **Permissions & Quota** button to specify quotas and assign users and groups.

1. **Quotas** are set up to limit the disk usage of the Volume.

1.1 From the the drop-down menu, choose a **Quota Type**:

- **None** - This option doesn't allow you to limit the disk usage of your Volume.
- **Deltas in Disk Safe** - This option ignores the overhead and only considers the size of the data being backed up.
- **On Disk Size** - This option considers both the size of the data being backed up and the overhead required to store that data.

1.2 Then specify the **Soft Quota** and **Hard Quota** for the selected Quota Type. Remember that the Hard Quota must be larger than the Soft Quota.

- **Soft Quota** - This is a warning level that informs users that they are close to reaching their effective limit. The value can be in bytes, KB, MB, GB, or TB.
- **Hard Quota** - This allows resources to be occupied by data. If the Hard Quota is reached, then the system forbids generation of new Recovery Points. The replication is interrupted and fails. The value can be in bytes, KB, MB, GB, or TB.

2. By **assigning Users/Groups to a Volume**, you give them permission to use the resources of that Volume.

2.1 Specify **Users and Groups** if necessary. To add a User or Group, click the appropriate "Add Another" button.



Tips

- The Users and Groups must have already been created. See [Add users](#), [Add groups](#).
- You can add Users and Groups later. See [Edit volumes](#).

3. Click the **Save** button.

Once you have finished configuring the Backup Storage, click the **Next** button to proceed.

Screen 3 - Set a Backup Policy

In this step, you can choose one of three pre-set policies and also customize your policy.

1. A **Policy** is a schedule and other settings describing how your Server will be backed up.

1.1 Select one of the following pre-configured **Policy Types**:

- **Standard** - Used for most non-critical production Servers. This Policy runs **every hour** and keeps the **10** most recent Recovery Points.
- **Mission Critical** - Used for Servers that are mission-critical to your business and need to be backed up frequently. This Policy runs **every 10 minutes** and keeps the **50** most recent Recovery Points.
- **On Demand Only** - Used for Servers that only need to be backed up manually. No automatic scheduled backups will be started. This Policy only runs **on demand** and keeps the **10** most recent Recovery Points.

1.2 If you click "Customize," you will see the following window.

You can define the following options:

- **Policy Name** - Enter the policy name.
- **Create New Backups** - Select how often your policy will run from this drop-down menu. The following options are available:
 - **On Demand**
 - **Minutely**
 - **Hourly**
 - **Daily**
- **Keep** - Enter the number of most recent backups that will be kept.
- **Archive** - Click the "Add Another" button and define the necessary options to add archiving to your policy. **Archiving** creates a copy of your most recent backup to be used for long-term data storage. An archived backup won't be deleted as part of the automatic merge process that removes older backups from a Disk Safe.

The following options are available:

- **Archive** - Select from the drop-down menu how often the archiving will be performed. The available options are as follows:
 - **Hourly**
 - **Daily**



Note

If the "Daily" option is selected, click "Choose Hours" and use the check-boxes to select the hours at which you want to start archiving.

Then click the **Add** button.

- **Keep** - This is the number of archives that will be kept. Correct the number if necessary.
- **Starting at** - Select from the drop-down menu the exact minute from which the archiving will be started.

2. Click the "Add Server" button to proceed.

Screen 4 - Finished

After clicking the "Add Server" button, the Volume and/or Disk Safe and Policy for this Server will be created. Then the Backup Agent will be deployed to the Server and the Server will be rebooted (if the option to reboot was selected). This process can take several minutes.



Tip

You can click the "Close" button to interrupt the process while the Volume and/or Disk Safe and Policies are being created, or while the Backup Agent is being deployed.

Finally, you will see the "Finished" message and the list of created objects. Click the **Close** button to **start your backup process**, as you have the "Start backing up now" check-box selected by default.



Tip

You cannot immediately interrupt the backup. If you need to stop the backup:

- Wait for the wizard to give you that option

or

- Manually verify that the Backup Agent is installed properly and that the Server has been rebooted, and then find and execute the Policy manually.

Now you can examine the newly created object in the application and edit its properties if needed.