

Agent Installation Wizard

Download Datto Client

First step on getting a server ready to backup is to download the Datto client from URL: **www.shadowsnap.com**. The installer is generic and can be used in any version of OS.

It is important that the server gets rebooted after installing the client so the backup process could start.

1. Scope / Background

This article describes the Agent Installation Wizard that is now available in the Web UI of the Datto device (as of SIRIS OS 2 2.784.4 / SirisUI 1.49.1). You can access the wizard by clicking on the **Protect** link. This wizard automates the *Download, Prepare, Configure, Encrypt, and Add* steps for multiple Windows agents.

NOTE: At this time, this wizard will not add [Linux Agents](#). If you'd like to add a Linux Agent, use the Legacy Add Agent interface.

2. Procedure

To start the Agent Installation Wizard, click on the **Protect** link in the web interface of the Datto device, as shown in Figure 1.

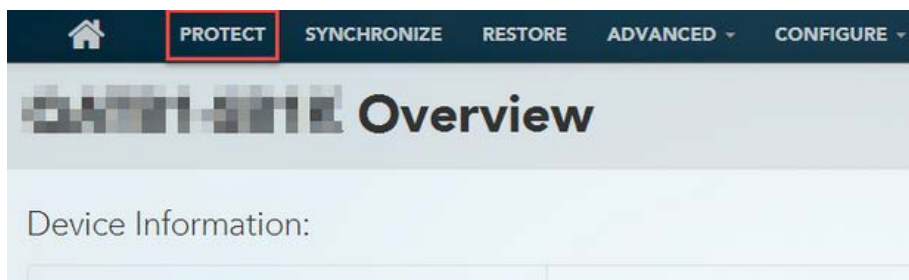


Figure 1 - Protect Tab

If this is the first agent on the device, you will see the window as in Figure 3. If this is not the first agent on the device, you will see a list of your agents and the **Add a New Agent** button in the upper right hand corner of the window.

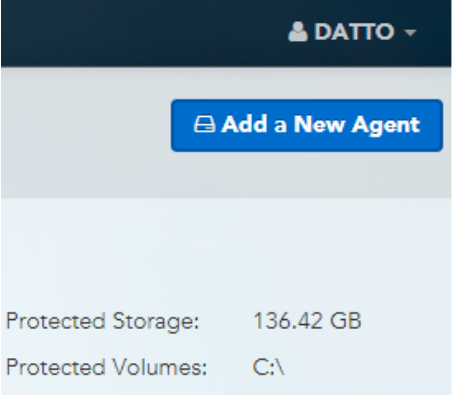
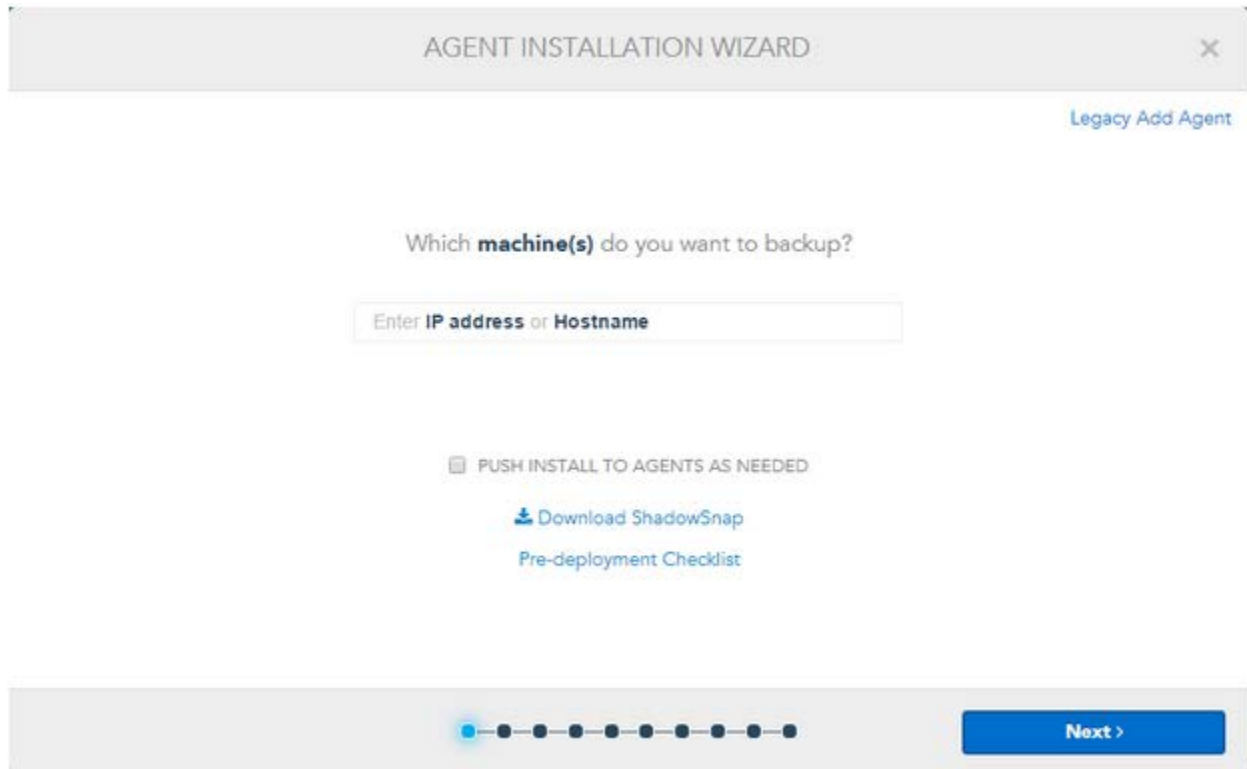


Figure 2 - Add a New Agent Button

2.1. Prepare / Download

When you click the **Add a New Agent** button (or the **Protect** tab if this is your first agent), you will get the screen as shown in Figure 3.



The screenshot shows the 'AGENT INSTALLATION WIZARD' window. At the top right is a close button (X). Below the title bar is a link for 'Legacy Add Agent'. The main content area asks 'Which machine(s) do you want to backup?' and features a text input field labeled 'Enter IP address or Hostname'. Below the input field is a checkbox labeled 'PUSH INSTALL TO AGENTS AS NEEDED'. Underneath are two links: 'Download ShadowSnap' and 'Pre-deployment Checklist'. At the bottom, there is a progress indicator with a series of dots, the first of which is highlighted in blue, and a blue 'Next >' button.

Figure 3 - Agent Install Wizard

In the "Enter IP address or Hostname" box, enter the IPs or hostnames of the machines that you would like to protect. Hit enter or the tab key to continue adding agents. You can also add a long list of agents, separated by commas.

- When you enter the address of a computer that has the agent installed, the entry turns blue. In that case, this wizard will skip the push install for that target but will still go through the steps to ask your preferences for backup configuration and encryption.
- If the IP or host name is incorrect or unreachable, the entry turns red, and you will get a message that says "Machine(s) could not be found." Check your network settings.
- For targets that do not have the agent installed, the entry will turn red. In this case, you can check the box to "Push install to agents as needed."

Remember that the agent installation process requires a reboot to complete.

Click **Download ShadowSnap**, and review the **Pre-deployment Checklist** by clicking the links.

Click **Next>**. If you chose to "Push install to agents as needed," the wizard will prompt you for the Windows Domain Administration credentials, as shown in Figure 4.

AGENT INSTALLATION WIZARD

What credentials should we use for **push install**?

WINDOWS DOMAIN

DOMAIN ADMIN USER

PASSWORD

REBOOT AFTER PUSH INSTALL

Domain admin user must be a local admin on push install target machine(s).

Prev Next >

Figure 4 - Windows Credentials

Enter your Windows domain administration credentials in this screen. To "push install" the agent, these credentials must gain local administrative access on the target machine(s).

Check in the box for "Reboot after push install" to automatically reboot the target machine(s) after the install. The reboot is required for agent installation.

Click the **Next>** button to continue to the Configuration Process.

2.2. Agent Configuration

This section describes the configuration process as it would appear if you do not already have an agent installed on your device. If you already have agents, you will get a prompt to use the settings from an existing agent, as described in **Section 2.5. Adding Another Agent**.

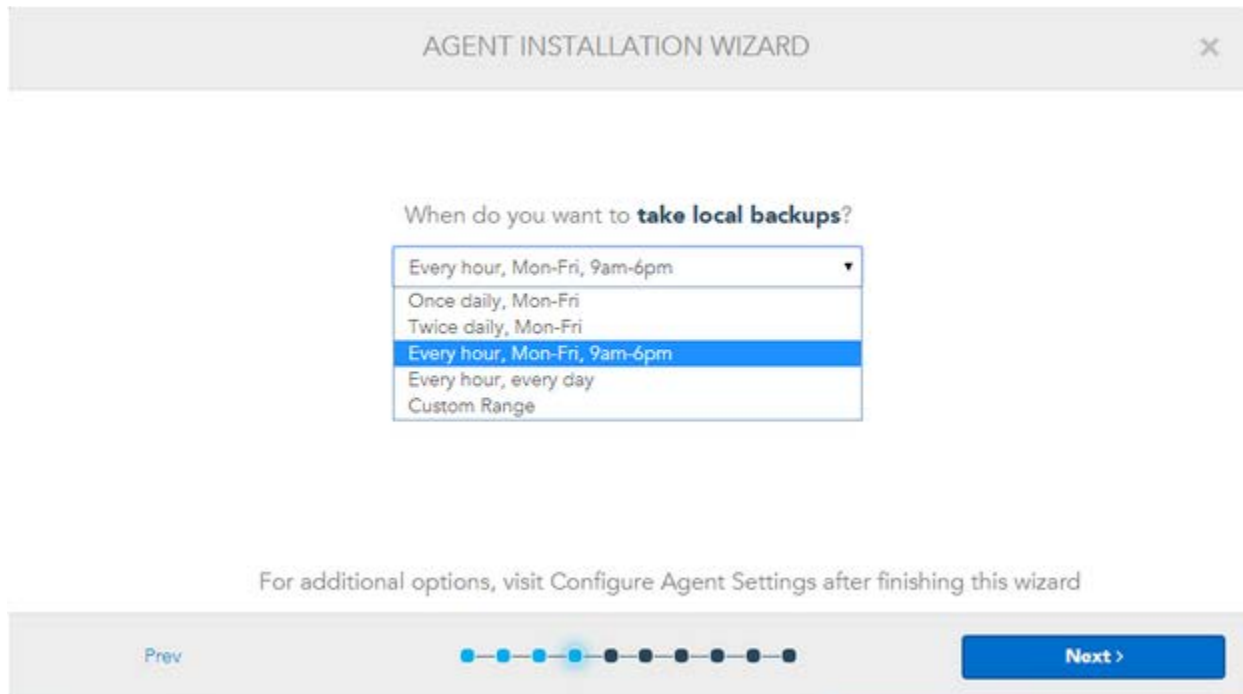


Figure 5 - Local Backup Schedule

In this screen, choose the schedule to back up from the target machine(s) to the Datto device. You can choose one of the default options or a "Custom Range."

If you choose Custom Range, you will see the days of the week and a drop-down to choose the backup frequency for those days. Click on days to select them. In Figure 7, Tuesday is selected.

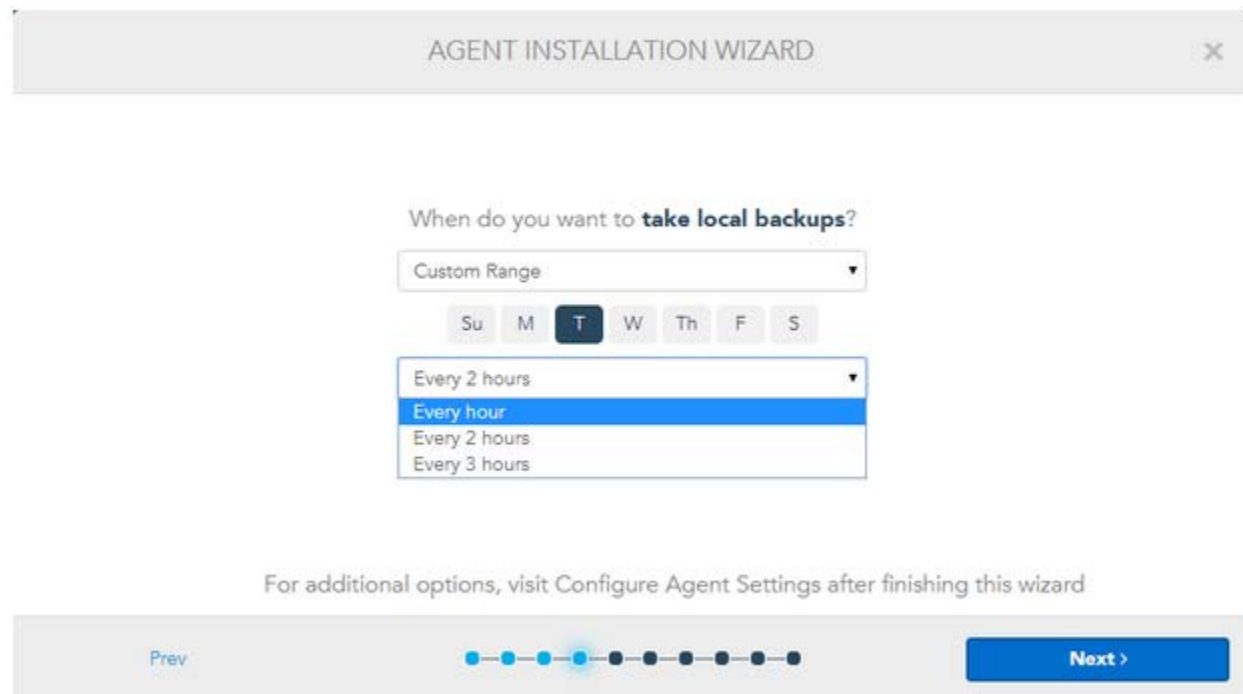


Figure 6 - Custom Backup Schedule

Click **Next>** to continue.

AGENT INSTALLATION WIZARD

When do you want to **send backups to the cloud**?

One backup per day

For additional options, visit [Configure Agent Settings](#) after finishing this wizard

Prev ●●●●●●●●● **Next >**

Figure 7 - Cloud Backup Schedule

Click the **Next>** button, and you will see the screen to configure when the backups from the device will be replicated in the Cloud. Choose your preference from the drop-down menu, and then click **Next>**.

AGENT INSTALLATION WIZARD

How long do you want to **keep your backups**?

LOCAL STORAGE		CLOUD STORAGE	
INTRA-DAILY TO DAILY	Every 5 days	INTRA-DAILY TO DAILY	Every 5 days
DAILY TO WEEKLY	Every week	DAILY TO WEEKLY	Every 2 weeks
WEEKLY TO MONTHLY	Every month	WEEKLY TO MONTHLY	Every month
DELETE MONTHLY	After 3 months	DELETE MONTHLY	Never

For additional options, visit [Configure Agent Settings](#) after finishing this wizard

Prev ●●●●●●●●● **Next >**

Figure 8 - Retention Settings

In this screen, you can set how long you want to keep your backups on the Datto device and in the Cloud. Figure 9 shows the default choices.

Note that the options on the right side of the window will be inaccessible if you are on a Time-Based Retention billing plan.

When you are ready, click **Next>**.

The screenshot shows a window titled 'AGENT INSTALLATION WIZARD' with a close button (X) in the top right corner. The main heading is 'Where and when do you want to receive screenshot proof of your backups?'. Below this, there is a text input field containing 'nobody@nowhere.com' with a green checkmark to its right. Underneath is a dropdown menu with four options: 'First point of the day', 'First point of the day' (highlighted in blue), 'Last point of the day', and 'Custom Selection'. Below the dropdown, a line of text reads 'For additional options, visit Configure Agent Settings after finishing this wizard'. At the bottom, there is a navigation bar with a 'Prev' button, a progress indicator consisting of 10 dots (the 6th dot is highlighted in blue), and a 'Next >' button.

Figure 9 - Screenshot Settings

Enter your email address to receive the screenshot proof of your backups. Also, choose which backup point(s) you would like screenshots for. Click **Next>**.

The screenshot shows a window titled 'AGENT INSTALLATION WIZARD' with a close button (X) in the top right corner. The main heading is 'Where should we send alerts & reports?'. Below this, there are three text input fields, each with a red 'X' to its right. The first field is labeled 'WARNING NOTICE', the second 'CRITICAL ERROR', and the third 'LOG DIGEST'. Below the input fields, a line of text reads 'For additional options, visit Configure Agent Settings after finishing this wizard'. At the bottom, there is a navigation bar with a 'Prev' button, a progress indicator consisting of 10 dots (the 7th dot is highlighted in blue), and a 'Next >' button.

Figure 10 - Reports and Alerts Settings

In this screen, enter the email address(es) where you want to send alerts and reports. Click **Next>**.

In the next screen, choose whether you want your agents to be encrypted. If you choose Yes, you will get a screen with the encryption agreement and then a screen asking for the encryption passphrase. Click **Next>**.

2.3. Agent Creation

While the wizard is working to create the agents, you will see a status bar with the following messages:

- Initializing for <agent hostname>
- Attempting to pair SC for <agent hostname>
- Writing agent data for <agent hostname>
- Creating local storage for <agent hostname>

Then, you will see a window telling you how many agents were created, as shown in Figure 12. Click **Add another** to add more agents. Click **continue** if you are done adding agents.



1 Agent created

[Add another](#) or [continue](#)

Figure 11 - Agent Creation Successful

2.4. Adding Another Agent

If you currently have an agent set up on your Datto device, and you start the process to add another agent, you will see the window as in Figure 13.

AGENT INSTALLATION WIZARD

Do you want to **use the settings from an existing agent?**

Yes

No

Figure 12 - Reuse Existing Settings

- If you click **Yes**, the wizard prompts you to choose which agent's settings you wish to use. After you choose the agent and click **Next>**, the settings are populated into the Agent Wizard. If you then click the **Prev** link, you can go back and change those "populated" settings.
- If you choose **No**, you will get the prompts to choose the configuration settings as in **Section 2.2. Configuration Process**.