



Rules

SaaS Backup for Microsoft 365

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Table of Contents

- Rules 1
 - Create new rules 1
 - Apply existing rules 2
 - Delete rules 2

Rules

Create new rules

Rules allow you to automatically move users to a preselected backup tier based on predefined criteria.

You can create rules for Microsoft Exchange Online, OneDrive for Business, SharePoint Online, and Microsoft Office 365 Groups.

You must apply a user defined filter to your data before you can create a rule. Applied filters are displayed below the **Filter** icon. NetApp SaaS Backup for Microsoft 365 default filters appear in gray. User defined filters appear in light blue.



Create a user defined filter

You can create multiple rules. The rules are applied in the order they appear in the **Manage Rules** list.

Steps

1. From the Dashboard, click the number above **UNPROTECTED** in the box of the service for which you want to create rules.




If no user created filter is applied,  does not appear.

2. Click **Filter**.



3. Click the **Select** dropdown menu and select your filter.
A search field appears.
4. Enter your search criteria.
5. Click **Apply Filter**.
6. Click **Create Rule**.
7. Enter a name for the rule.
8. For **Destination Group**, select the tier to which you want users who meet the rule's criteria to be moved.
9. Select **Apply to existing items** if you want the rule to be immediately applied to all unprotected items. If not selected, the rule is applied to newly discovered items and any unprotected items the next time new items are discovered.
- 10.



If you have multiple rules, you can click the  to move a rule up or down in the list. The rules are applied in the order they appear in the list.

Apply existing rules

Rules allow you to automatically move users to a preselected backup tier based on predefined criteria.

You can apply existing rules to unprotected items, change the order in which rules are applied, and delete rules.

Steps

1. From the Dashboard, click the number above **UNPROTECTED** in the box of the service for which you want to create rules.



2. Click **Filter**.



3. Click **Rules**.
The existing rules are displayed.
4. Click **Apply Now** to apply the rule to existing unprotected items.

Delete rules

If you no longer need an existing rule, you can delete it. Also, if you need to delete a security group that is used in a rule, you must delete the rule using the security group before the security group can be removed.

Steps

1. From the Dashboard, click the number above **UNPROTECTED** in the box of the service for which you want to create rules.



2. Click **Filter**.



3. Click **Rules**.

The existing rules are displayed.

- 4.



Click  to delete the rule.

The status of the items to which the rule was previously applies is not changed when the rule is deleted.

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