Manage users

SaaS Backup for Microsoft 365

NetApp

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Licenses

Add a license

If you have just received a license for a paid subscription, please follow workflow for getting started with a paid subscription. You will enter your license key as part of the workflow.

If you are already using SaaS Backup, you can follow these steps to add additional licenses.

Education domains can have a license for faculty and a separate license for students.

Steps

1. Click SERVICES from the left navigation pane.
2. Click in the right corner.
3. Enter the license information.
4. Click **Validate Subscription**.
5. Click **Next**.
6. Click **Save**.

Update subscription information

After you purchase an add-on license or subscription extension, you can update your subscription details inside of SaaS Backup.

Any regular user mailbox, whether protected or unprotected, consumes a license. Shared mailboxes do not consume a license.

Steps

1. Click **Services** from the left navigation pane.
2. Click in the right corner.
3. Click **Update** next to Subscription Details.
4. Enter the same username and password you used when you first signed up.
5. Click **Submit**.

Release a user license

Any regular or archive mailbox user, whether protected or unprotected, consumes a license. If a license is no longer needed for a particular user, you can release the license so that it can be reassigned. When a user license is released, the user is moved to the unprotected tier and backups for that user are discontinued.

Shared mailboxes do not consume a license.

Steps

1. Click next to your SaaS Backup user id in the top left corner.
2. Select **ACCOUNT SETTINGS**.
3. Click **RETAIN AND PURGE**.
4. Under **Release License**, begin typing the account name for the user whose license you want to release.
5. When the account is found, select it from the auto-populated list and click .
6. Add additional accounts, if needed.
7. Click **Release**.
8. Click **Yes, please release license(s)**.
9. Click **Confirm**.

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

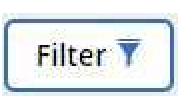
Rules allow you to automatically move users to a preselected backup tier based on predefined criteria.

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 a 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.

Security groups

Add security groups

Security groups can be used as filtering options to view your data and to create rules.

You can add up to 3 security groups. You can then use your security groups as filtering options in SaaS Backup.

New security groups must be discovered through an AutoSync or a manual synchronization before they can be added.
Create, edit, or delete a security group in the Admin Center.

Steps

1. Click **ACCOUNT SETTINGS**.
2. Click **SECURITY GROUPS**.
3. In the search field, enter the name of the security group you want to add.
4. Click **Add**.

Delete security groups

If a security group is being utilized in a user-defined rule, it cannot be deleted. You must remove the user-defined rule, then delete the security group.
Deleting rules

Steps

1. Click **ACCOUNT SETTINGS**.

2. Click **SECURITY GROUPS**.
3. Click the delete icon next to the group you want to remove.