



Rules

SaaS Backup for Microsoft 365

NetApp
June 20, 2025

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.

Status: Unprotected **Country: IN x**

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, **Create Rule** 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.

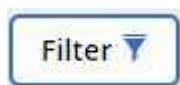
You can apply existing rules to unprotected items, change the order in which rules are applied, and delete rules.

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.

Copyright information

Copyright © 2025 NetApp, Inc. All Rights Reserved. Printed in the U.S. No part of this document covered by copyright may be reproduced in any form or by any means—graphic, electronic, or mechanical, including photocopying, recording, taping, or storage in an electronic retrieval system—without prior written permission of the copyright owner.

Software derived from copyrighted NetApp material is subject to the following license and disclaimer:

THIS SOFTWARE IS PROVIDED BY NETAPP “AS IS” AND WITHOUT ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, WHICH ARE HEREBY DISCLAIMED. IN NO EVENT SHALL NETAPP BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

NetApp reserves the right to change any products described herein at any time, and without notice. NetApp assumes no responsibility or liability arising from the use of products described herein, except as expressly agreed to in writing by NetApp. The use or purchase of this product does not convey a license under any patent rights, trademark rights, or any other intellectual property rights of NetApp.

The product described in this manual may be protected by one or more U.S. patents, foreign patents, or pending applications.

LIMITED RIGHTS LEGEND: Use, duplication, or disclosure by the government is subject to restrictions as set forth in subparagraph (b)(3) of the Rights in Technical Data -Noncommercial Items at DFARS 252.227-7013 (FEB 2014) and FAR 52.227-19 (DEC 2007).

Data contained herein pertains to a commercial product and/or commercial service (as defined in FAR 2.101) and is proprietary to NetApp, Inc. All NetApp technical data and computer software provided under this Agreement is commercial in nature and developed solely at private expense. The U.S. Government has a non-exclusive, non-transferrable, nonsublicensable, worldwide, limited irrevocable license to use the Data only in connection with and in support of the U.S. Government contract under which the Data was delivered. Except as provided herein, the Data may not be used, disclosed, reproduced, modified, performed, or displayed without the prior written approval of NetApp, Inc. United States Government license rights for the Department of Defense are limited to those rights identified in DFARS clause 252.227-7015(b) (FEB 2014).

Trademark information

NETAPP, the NETAPP logo, and the marks listed at <http://www.netapp.com/TM> are trademarks of NetApp, Inc. Other company and product names may be trademarks of their respective owners.