



# **Creating an ILM policy**

## **StorageGRID**

NetApp

October 03, 2025

This PDF was generated from <https://docs.netapp.com/us-en/storagegrid-115/ilm/creating-proposed-ilm-policy.html> on October 03, 2025. Always check docs.netapp.com for the latest.

# Table of Contents

- Creating an ILM policy . . . . . 1
  - Considerations for creating an ILM policy . . . . . 1
  - Creating a proposed ILM policy . . . . . 1
  - Creating an ILM policy after S3 Object Lock is enabled . . . . . 7
  - Simulating an ILM policy. . . . . 11
    - Examples for simulating ILM policies. . . . . 13
  - Activating the ILM policy . . . . . 19
  - Verifying an ILM policy with object metadata lookup . . . . . 21

# Creating an ILM policy

When you create an ILM policy, you start by selecting and arranging the ILM rules. Then, you verify the behavior of your proposed policy by simulating it against previously ingested objects. When you are satisfied that the proposed policy is functioning as intended, you can activate it to create the active policy.



An ILM policy that has been incorrectly configured can result in unrecoverable data loss. Before activating an ILM policy, carefully review the ILM policy and its ILM rules, and then simulate the ILM policy. Always confirm that the ILM policy will work as intended.

## Considerations for creating an ILM policy

- Use the system's built-in policy, Baseline 2 Copies Policy, in test systems only. The Make 2 Copies rule in this policy uses the All Storage Nodes storage pool, which contains all sites. If your StorageGRID system has more than one site, two copies of an object might be placed on the same site.
- When designing a new policy, consider all of the different types of objects that might be ingested into your grid. Make sure the policy includes rules to match and place these objects as required.
- Keep the ILM policy as simple as possible. This avoids potentially dangerous situations where object data is not protected as intended when changes are made to the StorageGRID system over time.
- Make sure that the rules in the policy are in the correct order. When the policy is activated, new and existing objects are evaluated by the rules in the order listed, starting at the top. For example, if the first rule in a policy matches an object, that rule will not be evaluated by any other rule.
- The last rule in every ILM policy is the default ILM rule, which cannot use any filters. If an object has not been matched by another rule, the default rule controls where that object is placed and for how long it is retained.
- Before activating a new policy, review any changes that the policy is making to the placement of existing objects. Changing an existing object's location might result in temporary resource issues when the new placements are evaluated and implemented.

### Related information

[What an ILM policy is](#)

[Example 6: Changing an ILM policy](#)

## Creating a proposed ILM policy

You can create a proposed ILM policy from scratch, or you can clone the current active policy if you want to start with the same set of rules.

### What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must have created the ILM rules you want to add to the proposed policy. As required, you can save a proposed policy, create additional rules, and then edit the proposed policy to add the new rules.
- You must have created a default ILM rule for the policy that does not contain any filters.

## Creating a default ILM rule

### About this task

Typical reasons for creating a proposed ILM policy include:

- You added a new site and need to use new ILM rules to place objects at that site.
- You are decommissioning a site and you need to remove all rules that refer to the site.
- You added a new tenant that has special data protection requirements.
- You started to use a Cloud Storage Pool.



Use the system's built-in policy, Baseline 2 Copies Policy, in test systems only. The Make 2 Copies rule in this policy uses the All Storage Nodes storage pool, which contains all sites. If your StorageGRID system has more than one site, two copies of an object might be placed on the same site.



If the global S3 Object Lock setting has been enabled, the steps for creating a policy are slightly different. You must ensure that the ILM policy is compliant with the requirements of buckets that have S3 Object Lock enabled.

[Creating an ILM policy after S3 Object Lock is enabled](#)

### Steps

1. Select **ILM > Policies**.

The ILM Policies page appears. From this page, you can review the list of proposed, active, and historical policies; create, edit, or remove a proposed policy; clone the active policy; or view the details for any policy.

#### ILM Policies

Review the proposed, active, and historical policies. You can create, edit, or delete a proposed policy; clone the active policy; or view the details for any policy.

[+ Create Proposed Policy](#) [Clone](#) [Edit](#) [Remove](#)

Policy Name	Policy State	Start Date	End Date
Baseline 2 Copies Policy	Active	2017-07-17 12:00:45 MDT	

#### Viewing Active Policy - Baseline 2 Copies Policy

Review the rules in this policy. If this is a proposed policy, click Simulate to verify the policy and then click Activate to make the policy active.

*Rules are evaluated in order, starting from the top.*

Rule Name	Default	Tenant Account
Make 2 Copies	<input checked="" type="checkbox"/>	Ignore

[Simulate](#) [Activate](#)

2. Determine how you want to create the proposed ILM policy.

Option	Steps
Create a new proposed policy that has no rules already selected	<p>a. If a proposed ILM policy currently exists, select that policy, and click <b>Remove</b>.</p> <p>You cannot create a new proposed policy if a proposed policy already exists.</p> <p>b. Click <b>Create Proposed Policy</b>.</p>
Create a proposed policy based on the active policy	<p>a. If a proposed ILM policy currently exists, select that policy, and click <b>Remove</b>.</p> <p>You cannot clone the active policy if a proposed policy already exists.</p> <p>b. Select the active policy from the table.</p> <p>c. Click <b>Clone</b>.</p>
Edit the existing proposed policy	<p>a. Select the proposed policy from the table.</p> <p>b. Click <b>Edit</b>.</p>

The Configure ILM Policy dialog box appears.

If you are creating a new proposed policy, all fields are blank and no rules are selected.

### Configure ILM Policy

Create a proposed policy by selecting and arranging rules. Then, save the policy and edit it later as required. Click Simulate to verify a saved policy using test objects. When you are ready, click Activate to make this policy the active ILM policy for the grid.

Name

Reason for change

Rules

- Select the rules you want to add to the policy.
- Determine the order in which the rules will be evaluated by dragging and dropping the rows. The default rule will be automatically placed at the end of the policy and cannot be moved.

+ Select Rules

Default	Rule Name	Tenant Account	Actions
No rules selected.			

Cancel

Save

If you are cloning the active policy, the **Name** field shows the name of the active policy, appended by a version number ("v2" in the example). The rules used in the active policy are selected and shown in their current order.

Name

Baseline 2 Copies Policy (v2)

Reason for change

3. Enter a unique name for the proposed policy in the **Name** field.

You must enter at least 1 and no more than 64 characters. If you are cloning the active policy, you can use the current name with the appended version number or you can enter a new name.

4. Enter the reason you are creating a new proposed policy in the **Reason for change** field.

You must enter at least 1 and no more than 128 characters.

5. To add rules to the policy, select **Select Rules**.




The Select Rules for Policy dialog box appears, with all defined rules listed. If you are cloning a policy:

- The rules used by the policy you are cloning are selected.
- If the policy you are cloning used any rules with no filters that were not the default rule, you are prompted to remove all but one of those rules.
- If the default rule used a filter, you are prompted to select a new default rule.
- If the default rule was not the last rule, a button allows you to move the rule to the end of the new policy.

Select Rules for Policy



Select Default Rule

This list shows the rules that do not use any filters. Select one rule to be the default rule for the policy. The default rule applies to any objects that do not match another rule in the policy and is always evaluated last. The default rule should retain objects forever.

	Rule Name
<input checked="" type="radio"/>	2 copies at 2 data centers 
<input type="radio"/>	2 copies at 2 data centers for 2 years 
<input type="radio"/>	Make 2 Copies 


Select Other Rules

The other rules in a policy are evaluated before the default rule and must use at least one filter. Each rule in this list uses at least one filter (tenant account, bucket name, or an advanced filter, such as object size).

	Rule Name	Tenant Account
<input type="checkbox"/>	1-site EC 	—
<input type="checkbox"/>	3-site EC 	—

Cancel

Apply

6. Select a rule name or the more details icon  to view the settings for that rule.

This example shows the details of an ILM rule that makes two replicated copies at two sites.

## Two-Site Replication for Other Tenants

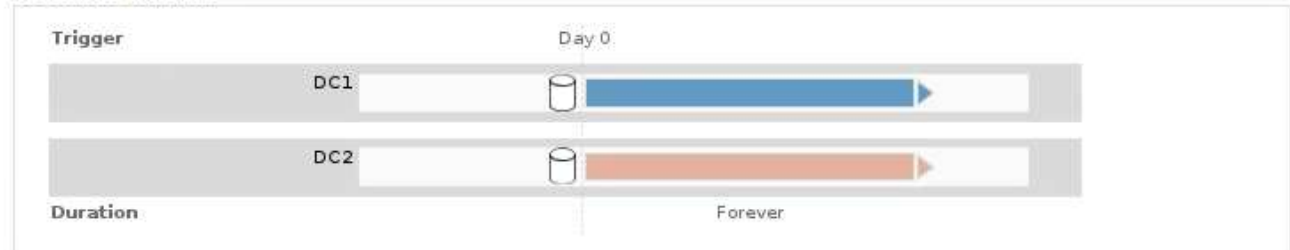
Description: Two-Site Replication for Other Tenants

Ingest Behavior: Balanced

Reference Time: Ingest Time

Filtering Criteria: Matches all objects.

Retention Diagram:



Close

7. In the **Select Default Rule** section, select one default rule for the proposed policy.

The default rule applies to any objects that do not match another rule in the policy. The default rule cannot use any filter and is always evaluated last.



If no rule is listed in the Select Default Rule section, you must exit the ILM policy page and create a default rule.

[Creating a default ILM rule](#)



Do not use the Make 2 Copies stock rule as the default rule for a policy. The Make 2 Copies rule uses a single storage pool, All Storage Nodes, which contains all sites. If your StorageGRID system has more than one site, two copies of an object might be placed on the same site.

8. In the **Select Other Rules** section, select any other rules you want to include in the policy.

The other rules are evaluated before the default rule and must use at least one filter (tenant account, bucket name, or an advanced filter, such as object size).

9. When you are done selecting rules, select **Apply**.

The rules you selected are listed. The default rule is at the end, with the other rules above it.

## Rules

1. Select the rules you want to add to the policy.
2. Determine the order in which the rules will be evaluated by dragging and dropping the rows. The default rule will be automatically placed at the end of the policy and cannot be moved.

Select Rules

	Default	Rule Name	Tenant Account	Actions
		3-site EC	Ignore	
		1-site EC	Ignore	
		2 copies at 2 data centers	Ignore	

Cancel

Save

A warning appears if the default rule does not retain objects forever. When you activate this policy, you must confirm that you want StorageGRID to delete objects when the placement instructions for the default rule elapse (unless a bucket lifecycle keeps the objects for longer).



	Default	Rule Name	Tenant Account	Actions
		3-site EC	Ignore	
		1-site EC	Ignore	
		2 copies at 2 data centers for 2 years	Ignore	

The default ILM rule in this policy does not retain objects forever. Confirm this is the behavior you expect. Otherwise, any objects that are not matched by another rule will be deleted after 720 days.

10. Drag and drop the rows for the non-default rules to determine the order in which these rules will be evaluated.

You cannot move the default rule.



You must confirm that the ILM rules are in the correct order. When the policy is activated, new and existing objects are evaluated by the rules in the order listed, starting at the top.

11. As required, click the delete icon to delete any rules that you do not want in the policy, or select **Select Rules** to add more rules.
12. When you are done, select **Save**.

The ILM Policies page is updated:

- The policy you saved is shown as Proposed. Proposed policies do not have start and end dates.
- The **Simulate** and **Activate** buttons are enabled.



## ILM Policies

Review the proposed, active, and historical policies. You can create, edit, or delete a proposed policy; clone the active policy; or view the details for any policy.

[+ Create Proposed Policy](#) [Clone](#) [Edit](#) [Remove](#)

Policy Name	Policy State	Start Date	End Date
• Data Protection for Three Sites	Proposed		
○ Data Protection for Two Sites	Active	2020-09-18 16:01:24 MDT	
○ Baseline 2 Copies Policy	Historical	2020-09-17 21:32:57 MDT	2020-09-18 16:01:24 MDT

**Viewing Proposed Policy - Data Protection for Three Sites**

Before activating a new ILM policy:

- Review and carefully simulate the policy. Errors in an ILM policy can cause irreparable data loss.
- Review any changes to the placement of existing replicated and erasure-coded objects. Changing an existing object's location might result in temporary resource issues when the new placements are evaluated and implemented.

See [Managing objects with information lifecycle management](#) for more information.

This policy contains a rule that makes an erasure-coded copy. Confirm that at least one rule uses the Object Size advanced filter to prevent objects that are 200 KB or smaller from being erasure coded. See [Managing objects with information lifecycle management](#) for more information.

Review the rules in this policy. If this is a proposed policy, click Simulate to verify the policy and then click Activate to make the policy active.

**Reason for change:** Added a third site

Rules are evaluated in order, starting from the top.

Rule Name	Default	Tenant Account
One-Site Erasure Coding for Tenant A <a href="#">🔗</a>		Tenant A (20033011709864740158)
Three-Site Replication for Other Tenants <a href="#">🔗</a>	✓	Ignore

[Simulate](#) [Activate](#)

13. Go to [Simulating an ILM policy](#).

### Related information

[What an ILM policy is](#)

[Managing objects with S3 Object Lock](#)

## Creating an ILM policy after S3 Object Lock is enabled

If the global S3 Object Lock setting is enabled, the steps for creating a policy are slightly different. You must ensure that the ILM policy is compliant with the requirements of buckets that have S3 Object Lock enabled.

### What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- The global S3 Object Lock setting must already be enabled for the StorageGRID system.



If the global S3 Object Lock setting has not been enabled, use the general instructions for creating a proposed policy instead.

[Creating a proposed ILM policy](#)

- You must have created the compliant and non-compliant ILM rules you want to add to the proposed policy. As required, you can save a proposed policy, create additional rules, and then edit the proposed policy to add the new rules.

### Example 7: Compliant ILM policy for S3 Object Lock

- You must have created a compliant default ILM rule for the policy.

### Creating a default ILM rule

## Steps

1. Select **ILM > Policies**.

The ILM Policies page appears. If the global S3 Object Lock setting is enabled, the ILM Policies page indicates which ILM rules are compliant.

#### ILM Policies

Review the proposed, active, and historical policies. You can create, edit, or delete a proposed policy; clone the active policy; or view the details for any policy.

+ Create Proposed Policy
Clone
Edit
Remove

Policy Name	Policy State	Start Date	End Date
Baseline 2 Copies Policy	Active	2021-02-04 01:04:29 MST	

#### Viewing Active Policy - Baseline 2 Copies Policy

Review the rules in this policy. If this is a proposed policy, click Simulate to verify the policy and then click Activate to make the policy active.

Rules are evaluated in order, starting from the top. The policy's default rule must be compliant.

Rule Name	Default	Compliant	Tenant Account
Make 2 Copies	✓	✓	Ignore

Simulate
Activate

2. Enter a unique name for the proposed policy in the **Name** field.

You must enter at least 1 and no more than 64 characters.

3. Enter the reason you are creating a new proposed policy in the **Reason for change** field.

You must enter at least 1 and no more than 128 characters.

4. To add rules to the policy, select **Select Rules**.


The Select Rules for Policy dialog box appears, with all defined rules listed.

- The Select Default Rule section lists the rules that can be the default for a compliant policy. It includes compliant rules that do not use filters.
- The Select Other Rules section lists the other compliant and non-compliant rules that can be selected for this policy.

## Select Rules for Policy



### Select Default Rule

This list shows the rules that are compliant and do not use any filters. Select one rule to be the default rule for the policy. The default rule applies to any objects that do not match another rule in the policy and is always evaluated last.

	Rule Name
<input type="radio"/>	Default Compliant Rule: Two Copies Two Data Centers 
<input type="radio"/>	Make 2 Copies 


### Select Other Rules

The other rules in a policy are evaluated before the default rule. If you need a different "default" rule for objects in non-compliant S3 buckets, select one non-compliant rule that does not use a filter. Any other rules in the policy must use at least one filter (tenant account, bucket name, or an advanced filter, such as object size).

	Rule Name	Compliant	Uses Filter	Is Selectable
<input type="checkbox"/>	Compliant Rule: EC for bank-records bucket - Bank of ABC 	✓	✓	Yes
<input type="checkbox"/>	Non-Compliant Rule: Use Cloud Storage Pool 			Yes

Cancel

Apply

5. Select a rule name or the more details icon  to view the settings for that rule.

6. In the **Select Default Rule** section, select one default rule for the proposed policy.

The table in this section only lists the rules that are compliant and do not use any filters.



If no rule is listed in the Select Default Rule section, you must exit the ILM policy page and create a default rule that is compliant.

[Creating a default ILM rule](#)



Do not use the Make 2 Copies stock rule as the default rule for a policy. The Make 2 Copies rule uses a single storage pool, All Storage Nodes, which contains all sites. If you use this rule, multiple copies of an object might be placed on the same site.

7. In the **Select Other Rules** section, select any other rules you want to include in the policy.

- If you need a different "default" rule for objects in non-compliant S3 buckets, optionally select one non-compliant rule that does not use a filter.

For example, you might want to use a Cloud Storage Pool or an Archive Node to store objects in buckets that do not have S3 Object Lock enabled.



You can only select one non-compliant rule that does not use a filter. As soon as you select one rule, the **Is Selectable** column shows **No** for any other non-compliant rules without filters.

- Select any other compliant or non-compliant rules you want to use in the policy.

The other rules must use at least one filter (tenant account, bucket name, or an advanced filter, such as object size).

8. When you are done selecting the rules, select **Apply**.

The rules you selected are listed. The default rule is at the end, with the other rules above it. If you also selected a non-compliant “default” rule, that rule is added as the second-to-last rule in the policy.

In this example, the last rule, 2 Copies 2 Data Centers, is the default rule: it is compliant and has no filters. The second-to-last rule, Cloud Storage Pool, also has no filters but it is not compliant.

### Configure ILM Policy

Create a proposed policy by selecting and arranging rules. Then, save the policy and edit it later as required. Click Simulate to verify a saved policy using test objects. When you are ready, click Activate to make this policy the active ILM policy for the grid.

Name

Compliant ILM Policy for S3 Object Lock

Reason for change

Example policy

#### Rules

1. Select the rules you want to add to the policy.

2. Determine the order in which the rules will be evaluated by dragging and dropping the rows. The default rule (and any non-compliant rule without a filter) will be automatically placed at the end of the policy and cannot be moved.

+ Select Rules

Default	Rule Name	Compliant	Tenant Account	Actions
	Compliant Rule: EC for bank-records bucket - Bank of ABC	✓	Bank of ABC (90767802913525281639)	✕
	Non-Compliant Rule: Use Cloud Storage Pool		Ignore	✕
✓	Default Compliant Rule: Two Copies Two Data Centers	✓	Ignore	✕

Cancel

Save

9. Drag and drop the rows for the non-default rules to determine the order in which these rules will be evaluated.

You cannot move the default rule or the non-compliant “default” rule.



You must confirm that the ILM rules are in the correct order. When the policy is activated, new and existing objects are evaluated by the rules in the order listed, starting at the top.

10. As required, click the delete icon to delete any rules that you do not want in the policy, or select **Select Rules** to add more rules.

11. When you are done, select **Save**.

The ILM Policies page is updated:

- The policy you saved is shown as Proposed. Proposed policies do not have start and end dates.
- The **Simulate** and **Activate** buttons are enabled.

## ILM Policies

Review the proposed, active, and historical policies. You can create, edit, or delete a proposed policy; clone the active policy; or view the details for any policy.

[+ Create Proposed Policy](#) [Clone](#) [Edit](#) [Remove](#)

Policy Name	Policy State	Start Date	End Date
Compliant ILM Policy for S3 Object Lock	Proposed		
Compliant ILM Policy	Active	2021-02-05 16:22:53 MST	
Non-Compliant ILM policy	Historical	2021-02-05 15:17:05 MST	2021-02-05 16:22:53 MST
Baseline 2 Copies Policy	Historical	2021-02-04 21:35:52 MST	2021-02-05 15:17:05 MST

**Viewing Proposed Policy - Compliant ILM Policy for S3 Object Lock**

Before activating a new ILM policy:

- Review and carefully simulate the policy. Errors in an ILM policy can cause irreparable data loss.
- Review any changes to the placement of existing replicated and erasure-coded objects. Changing an existing object's location might result in temporary resource issues when the new placements are evaluated and implemented.

See [Managing objects with information lifecycle management](#) for more information.

This policy contains a rule that makes an erasure-coded copy. Confirm that at least one rule uses the Object Size advanced filter to prevent objects that are 200 KB or smaller from being erasure coded. See [Managing objects with information lifecycle management](#) for more information.

Review the rules in this policy. If this is a proposed policy, click Simulate to verify the policy and then click Activate to make the policy active.

**Reason for change:** [Example policy](#)

*Rules are evaluated in order, starting from the top. The policy's default rule must be compliant.*

Rule Name	Default	Compliant	Tenant Account
Compliant Rule: EC for bank-records bucket - Bank of ABC <a href="#">🔗</a>		✓	Bank of ABC (90767802913525281639)
Non-Compliant Rule: Use Cloud Storage Pool <a href="#">🔗</a>			Ignore
Default Compliant Rule: Two Copies Two Data Centers <a href="#">🔗</a>	✓	✓	Ignore

[Simulate](#) [Activate](#)

12. Go to [Simulating an ILM policy](#).

## Simulating an ILM policy

You should simulate a proposed policy on test objects before activating the policy and applying it to your production data. The simulation window provides a standalone environment that is safe for testing policies before they are activated and applied to data in the production environment.

### What you'll need


- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must know the S3 bucket/object-key or the Swift container/object-name for each object you want to test, and you must have already ingested those objects.

### About this task

You must carefully select the objects you want the proposed policy to test. To simulate a policy thoroughly, you should test at least one object for each filter in each rule.

For example, if a policy includes one rule to match objects in bucket A and another rule to match objects in bucket B, you must select at least one object from bucket A and one object from bucket B to test the policy thoroughly. If the policy includes a default rule to place all other objects, you must test at least one object from another bucket.

When simulating a policy, the following considerations apply:

- After you make changes to a policy, save the proposed policy. Then, simulate the behavior of the saved proposed policy.
- When you simulate a policy, the ILM rules in the policy filter the test objects, so you can see which rule was applied to each object. However, no object copies are made and no objects are placed. Running a simulation does not modify your data, rules, or the policy in any way.
- The Simulation page retains the objects you tested until you close, navigate away from, or refresh the ILM Policies page.
- Simulation returns the name of the matched rule. To determine which storage pool or Erasure Coding profile is in effect, you can view the Retention Diagram by clicking the rule name or the more details icon .
- If S3 Versioning is enabled, the policy is only simulated against the current version of the object.

## Steps

1. Select and arrange the rules, and save the proposed policy.

The policy in this example has three rules:

Rule Name	Filter	Type of Copies	Retention
X-men	<ul style="list-style-type: none"><li>• Tenant A</li><li>• User metadata (series=x-men)</li></ul>	2 copies at two data centers	2 years
PNGs	Key ends with .png	2 copies at two data centers	5 years
Two Copies Two Data Centers	<i>None</i>	2 copies at two data centers	Forever

**Viewing Proposed Policy - Example ILM policy**

Before activating a new ILM policy:

- Review and carefully simulate the policy. Errors in an ILM policy can cause irreparable data loss.
- Review any changes to the placement of existing replicated and erasure-coded objects. Changing an existing object's location might result in temporary resource issues when the new placements are evaluated and implemented.

See [Managing objects with information lifecycle management](#) for more information.

Review the rules in this policy. If this is a proposed policy, click **Simulate** to verify the policy and then click **Activate** to make the policy active.

**Reason for change:** Example policy

*Rules are evaluated in order, starting from the top.*

Rule Name	Default	Tenant Account
X-men 		Tenant A (94793396288150002349)
PNGs 		Ignore
Two Copies at Two Data Centers 	✓	Ignore

**Simulate** **Activate**


2. Click **Simulate**.

The Simulation ILM Policy dialog box appears.



3. In the **Object** field, enter the S3 bucket/object-key or the Swift container/object-name for a test object, and click **Simulate**.

A message appears if you specify an object that has not been ingested.



Object

photos/test

Object 'photos/test' not found.

Simulate

4. Under **Simulation Results**, confirm that each object was matched by the correct rule.

In the example, the `Havok.png` and `Warpath.jpg` objects were correctly matched by the X-men rule. The `Fullsteam.png` object, which does not include `series=x-men` user metadata, was not matched by the X-men rule but was correctly matched by the PNGs rule. The default rule was not used because all three objects were matched by other rules.

Simulate ILM Policy - Demo




Simulates the active ILM policy or, if there is a proposed ILM policy, simulates the proposed ILM policy. Use this simulation to test the current configuration of ILM rules and determine whether ILM rules copy and place object data as intended.

Object

my-bucket/my-object-name or my-container/my-object-name

Simulate

Simulation Results ?

Object	Rule Matched	Previous Match	
photos/Havok.png	X-men 		✘
photos/Warpath.jpg	X-men 		✘
photos/Fullsteam.png	PNGs 		✘

Finish

## Examples for simulating ILM policies

These examples show how you can verify ILM rules by simulating the ILM policy before activating it.

### Example 1: Verifying rules when simulating a proposed ILM policy

This example shows how to verify rules when simulating a proposed policy.

In this example, the **Example ILM policy** is being simulated against the ingested objects in two buckets. The policy includes three rules, as follows:

- The first rule, **Two copies, two years for bucket-a**, applies only to objects in bucket-a.
- The second rule, **EC objects > 1 MB**, applies to all buckets but filters on objects greater than 1 MB.
- The third rule is the default rule and does not include any filters.

## Viewing Proposed Policy - Example ILM policy

Before activating a new ILM policy:

- Review and carefully simulate the policy. Errors in an ILM policy can cause irreparable data loss.
- Review any changes to the placement of existing replicated and erasure-coded objects. Changing an existing object's location might result in temporary resource issues when the new placements are evaluated and implemented.

See [Managing objects with information lifecycle management](#) for more information.

This policy contains a rule that makes an erasure-coded copy. Confirm that at least one rule uses the Object Size advanced filter to prevent objects that are 200 KB or smaller from being erasure coded. See [Managing objects with information lifecycle management](#) for more information.

Review the rules in this policy. If this is a proposed policy, click Simulate to verify the policy and then click Activate to make the policy active.

Reason for change: Example policy

Rules are evaluated in order, starting from the top.

Rule Name	Default	Tenant Account
Two copies, two years for bucket-a 		—
EC objects > 1 MB 		—
Two copies, two data centers 	✓	—

SimulateActivate

## Steps

1. After adding the rules and saving the policy, click **Simulate**.

The Simulate ILM Policy dialog box appears.

2. In the **Object** field, enter the S3 bucket/object-key or the Swift container/object-name for a test object, and click **Simulate**.

The Simulation Results appear, showing which rule in the policy matched each object you tested.

## Simulate ILM Policy - Example ILM policy

Simulates the active ILM policy or, if there is a proposed ILM policy, simulates the proposed ILM policy. Use this simulation to test the current configuration of ILM rules and determine whether ILM rules copy and place object data as intended.

Object  Simulate

### Simulation Results

Object	Rule Matched	Previous Match	
bucket-a/bucket-a object.pdf	Two copies, two years for bucket-a 		✗
bucket-b/test object greater than 1 MB.pdf	EC objects > 1 MB 		✗
bucket-b/test object less than 1 MB.pdf	Two copies, two data centers 		✗

Finish

3. Confirm that each object was matched by the correct rule.

In this example:

- a. bucket-a/bucket-a object.pdf correctly matched the first rule, which filters on objects in bucket-a.
- b. bucket-b/test object greater than 1 MB.pdf is in bucket-b, so it did not match the first rule. Instead, it was correctly matched by the second rule, which filters on objects greater than 1 MB.



c. bucket-b/test object less than 1 MB.pdf did not match the filters in the first two rules, so it will be placed by the default rule, which includes no filters.

## Example 2: Reordering rules when simulating a proposed ILM policy

This example shows how you can reorder rules to change the results when simulating a policy.

In this example, the **Demo** policy is being simulated. This policy, which is intended to find objects that have series=x-men user metadata, includes three rules, as follows:

- The first rule, **PNGs**, filters for key names that end in .png.
- The second rule, **X-men**, applies only to objects for Tenant A and filters for series=x-men user metadata.
- The last rule, **Two copies two data centers**, is the default rule, which matches any objects that do not match the first two rules.

**Viewing Proposed Policy - Demo**

Before activating a new ILM policy:




- Review and carefully simulate the policy. Errors in an ILM policy can cause irreparable data loss.
- Review any changes to the placement of existing replicated and erasure-coded objects. Changing an existing object's location might result in temporary resource issues when the new placements are evaluated and implemented.

See [Managing objects with information lifecycle management](#) for more information.

Review the rules in this policy. If this is a proposed policy, click Simulate to verify the policy and then click Activate to make the policy active.

Reason for change: new policy

Rules are evaluated in order, starting from the top.

Rule Name	Default	Tenant Account
PNGs 		Ignore
X-men 		Tenant A (24365814597594524591)
Two copies two data centers 	✓	Ignore

SimulateActivate

## Steps

1. After adding the rules and saving the policy, click **Simulate**.
2. In the **Object** field, enter the S3 bucket/object-key or the Swift container/object-name for a test object, and click **Simulate**.

The Simulation Results appear, showing that the Havok.png object was matched by the **PNGs** rule.

## Simulate ILM Policy - Demo

Simulates the active ILM policy or, if there is a proposed ILM policy, simulates the proposed ILM policy. Use this simulation to test the current configuration of ILM rules and determine whether ILM rules copy and place object data as intended.

Object

### Simulation Results

Object	Rule Matched	Previous Match	
photos/Havok.png	PNGs 		

However, the rule that the `Havok.png` object was meant to test was the **X-men** rule.

3. To resolve the issue, reorder the rules.
  - a. Click **Finish** to close the Simulate ILM Policy page.
  - b. Click **Edit** to edit the policy.
  - c. Drag the **X-men** rule to the top of the list.

## Configure ILM Policy

Create a proposed policy by selecting and arranging rules. Then, save the policy and edit it later as required. Click Simulate to verify a saved policy using test objects. When you are ready, click Activate to make this policy the active ILM policy for the grid.

Name

Reason for change

### Rules

1. Select the rules you want to add to the policy.
2. Determine the order in which the rules will be evaluated by dragging and dropping the rows. The default rule will be automatically placed at the end of the policy and cannot be moved.

	Default	Rule Name	Tenant Account	Actions
		X-men 	Tenant A (48713995194927812566)	
		PNGs 	—	
		Two copies, two data centers 	—	

- d. Click **Save**.

4. Click **Simulate**.

The objects you previously tested are re-evaluated against the updated policy, and the new simulation results are shown. In the example, the Rule Matched column shows that the `Havok.png` object now matches the X-men metadata rule, as expected. The Previous Match column shows that the PNGs rule matched the object in the previous simulation.

## Simulate ILM Policy - Demo

Simulates the active ILM policy or, if there is a proposed ILM policy, simulates the proposed ILM policy. Use this simulation to test the current configuration of ILM rules and determine whether ILM rules copy and place object data as intended.

Object

Simulate

### Simulation Results

Object	Rule Matched	Previous Match	
photos/Havok.png	X-men 	PNGs 	

Finish



If you stay on the Configure Policies page, you can re-simulate a policy after making changes without needing to re-enter the names of the test objects.

### Example 3: Correcting a rule when simulating a proposed ILM policy

This example shows how to simulate a policy, correct a rule in the policy, and continue the simulation.

In this example, the **Demo** policy is being simulated. This policy is intended to find objects that have `series=x-men` user metadata. However, unexpected results occurred when simulating this policy against the `Beast.jpg` object. Instead of matching the X-men metadata rule, the object matched the default rule, Two copies two data centers.



## Simulate ILM Policy - Demo

Simulates the active ILM policy or, if there is a proposed ILM policy, simulates the proposed ILM policy. Use this simulation to test the current configuration of ILM rules and determine whether ILM rules copy and place object data as intended.

Object

Simulate


### Simulation Results

Object	Rule Matched	Previous Match	
photos/Beast.jpg	Two copies two data centers 		

Finish

When a test object is not matched by the expected rule in the policy, you must examine each rule in the policy and correct any errors.

### Steps

1. For each rule in the policy, view the rule settings by clicking the rule name or the more details icon  on any dialog box where the rule is displayed.
2. Review the rule's tenant account, reference time, and filtering criteria.

In this example, the metadata for the X-men rule includes an error. The metadata value was entered as "x-men1" instead of "x-men."

## X-men

Ingest Behavior: Balanced  
Tenant Account: 06846027571548027538  
Reference Time: Ingest Time  
Filtering Criteria:

Matches all of the following metadata:

User Metadata

series

equals

x-men1

### Retention Diagram:

Trigger

Day 0

All Storage Nodes



Duration


Forever

Close

3. To resolve the error, correct the rule, as follows:

- If the rule is part of the proposed policy, you can either clone the rule or remove the rule from the policy and then edit it.
- If the rule is part of the active policy, you must clone the rule. You cannot edit or remove a rule from the active policy.

Option	Description
Cloning the rule	<ol style="list-style-type: none"><li>Select <b>ILM &gt; Rules</b>.</li><li>Select the incorrect rule, and click <b>Clone</b>.</li><li>Change the incorrect information, and click <b>Save</b>.</li><li>Select <b>ILM &gt; Policies</b>.</li><li>Select the proposed policy, and click <b>Edit</b>.</li><li>Click <b>Select Rules</b>.</li><li>Select the check box for the new rule, uncheck the check box for the original rule, and click <b>Apply</b>.</li><li>Click <b>Save</b>.</li></ol>

Option	Description
Editing the rule	<ol style="list-style-type: none"> <li>Select the proposed policy, and click <b>Edit</b>.</li> <li>Click the delete icon  to remove the incorrect rule, and click <b>Save</b>.</li> <li>Select <b>ILM &gt; Rules</b>.</li> <li>Select the incorrect rule, and click <b>Edit</b>.</li> <li>Change the incorrect information, and click <b>Save</b>.</li> <li>Select <b>ILM &gt; Policies</b>.</li> <li>Select the proposed policy, and click <b>Edit</b>.</li> <li>Select the corrected rule, click <b>Apply</b>, and click <b>Save</b>.</li> </ol>

4. Perform the simulation again.



Because you navigated away from the ILM Policies page to edit the rule, the objects you previously entered for simulation are no longer displayed. You must re-enter the names of the objects.


In this example, the corrected X-men rule now matches the `Beast.jpg` object based on the `series=x-men` user metadata, as expected.

### Simulate ILM Policy - Demo

Simulates the active ILM policy or, if there is a proposed ILM policy, simulates the proposed ILM policy. Use this simulation to test the current configuration of ILM rules and determine whether ILM rules copy and place object data as intended.

Object

#### Simulation Results

Object	Rule Matched	Previous Match	
photos/Beast.jpg	X-men 		

## Activating the ILM policy

After you add ILM rules to a proposed ILM policy, simulate the policy, and confirm it behaves as you expect, you are ready to activate the proposed policy.

### What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must have saved and simulated the proposed ILM policy.



Errors in an ILM policy can cause unrecoverable data loss. Carefully review and simulate the policy before activating it to confirm that it will work as intended.



When you activate a new ILM policy, StorageGRID uses it to manage all objects, including existing objects and newly ingested objects. Before activating a new ILM policy, review any changes to the placement of existing replicated and erasure-coded objects. Changing an existing object's location might result in temporary resource issues when the new placements are evaluated and implemented.

### About this task

When you activate an ILM policy, the system distributes the new policy to all nodes. However, the new active policy might not actually take effect until all grid nodes are available to receive the new policy. In some cases, the system waits to implement a new active policy to ensure that grid objects are not accidentally removed.

- If you make policy changes that increase data redundancy or durability, those changes are implemented immediately. For example, if you activate a new policy that includes a three-copies rule instead of a two-copies rule, that policy will be implemented right away because it increases data redundancy.
- If you make policy changes that could decrease data redundancy or durability, those changes will not be implemented until all grid nodes are available. For example, if you activate a new policy that uses a two-copies rule instead of a three-copies rule, the new policy will be marked as “Active,” but it will not take effect until all nodes are online and available.

### Steps

1. When you are ready to activate a proposed policy, select the policy on the ILM Policies page and click **Activate**.

A warning message is displayed, prompting you to confirm that you want to activate the proposed policy.

#### Warning

##### Activate the proposed policy

Errors in an ILM policy can cause irreparable data loss. Review and test the policy carefully before activating. Are you sure you want to activate the proposed policy?

Cancel

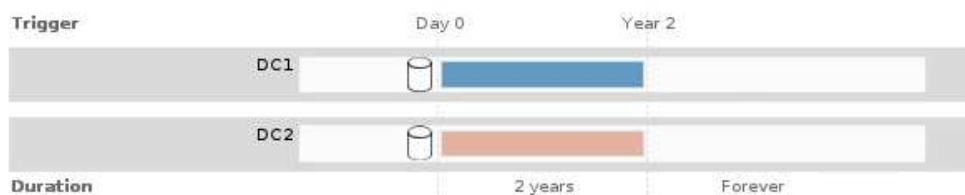
OK

A prompt appears in the warning message if the default rule for the policy does not retain objects forever. In this example, the retention diagram shows that the default rule will delete objects after 2 years. You must type **2** in the text box to acknowledge that any objects not matched by another rule in the policy will be removed from StorageGRID after 2 years.

## ⚠ Activate the proposed policy

Errors in an ILM policy can cause irreparable data loss. Review and test the policy carefully before activating.

The default rule in this policy does not retain objects forever. Confirm this is the behavior you want by referring to the retention diagram for the default rule:



Now, complete the following prompt:

Any objects that are not matched by another rule in this policy will be deleted after  years.

Are you sure you want to activate the proposed policy?

Cancel

OK

2. Click **OK**.

### Result

When a new ILM policy has been activated:

- The policy is shown with a Policy State of Active in the table on the ILM Policies page. The Start Date entry indicates the date and time the policy was activated.

#### ILM Policies

Review the proposed, active, and historical policies. You can create, edit, or delete a proposed policy; clone the active policy; or view the details for any policy.

<div><div>+ Create Proposed Policy</div><div>Clone</div><div>Edit</div><div>Remove</div></div>			
Policy Name	Policy State	Start Date	End Date
<input checked="" type="radio"/> New Policy	Active	2017-07-20 18:49:53 MDT	
<input type="radio"/> Baseline 2 Copies Policy	Historical	2017-07-19 21:24:30 MDT	2017-07-20 18:49:53 MDT

- The previously active policy is shown with a Policy State of Historical. The Start Date and End Date entries indicate when the policy became active and when it was no longer in effect.

### Related information

[Example 6: Changing an ILM policy](#)

## Verifying an ILM policy with object metadata lookup

After you have activated an ILM policy, you should ingest representative test objects into the StorageGRID system. You should then perform an object metadata lookup to confirm that copies are being made as intended and placed in the correct locations.

### What you'll need

- You must have an object identifier, which can be one of:
  - UUID:** The object's Universally Unique Identifier. Enter the UUID in all uppercase.

- **CBID:** The object's unique identifier within StorageGRID. You can obtain an object's CBID from the audit log. Enter the CBID in all uppercase.
- **S3 bucket and object key:** When an object is ingested through the S3 interface, the client application uses a bucket and object key combination to store and identify the object.
- **Swift container and object name:** When an object is ingested through the Swift interface, the client application uses a container and object name combination to store and identify the object.

## Steps

1. Ingest the object.
2. Select **ILM > Object Metadata Lookup**.
3. Type the object's identifier in the **Identifier** field.

You can enter a UUID, CBID, S3 bucket/object-key, or Swift container/object-name.

### Object Metadata Lookup

Enter the identifier for any object stored in the grid to view its metadata.

Identifier	source/testobject	<div style="background-color: #4a86e8; color: white; padding: 10px 20px; border-radius: 3px; cursor: pointer;">Look Up</div>
------------	-------------------	--

4. Click **Look Up**.

The object metadata lookup results appear. This page lists the following types of information:

- System metadata, including the object ID (UUID), the object name, the name of the container, the tenant account name or ID, the logical size of the object, the date and time the object was first created, and the date and time the object was last modified.
- Any custom user metadata key-value pairs associated with the object.
- For S3 objects, any object tag key-value pairs associated with the object.
- For replicated object copies, the current storage location of each copy.
- For erasure-coded object copies, the current storage location of each fragment.
- For object copies in a Cloud Storage Pool, the location of the object, including the name of the external bucket and the object's unique identifier.
- For segmented objects and multipart objects, a list of object segments including segment identifiers and data sizes. For objects with more than 100 segments, only the first 100 segments are shown.
- All object metadata in the unprocessed, internal storage format. This raw metadata includes internal system metadata that is not guaranteed to persist from release to release.

The following example shows the object metadata lookup results for an S3 test object that is stored as two replicated copies.



### System Metadata

Object ID	A12E96FF-B13F-4905-9E9E-45373F6E7DA8
Name	testobject
Container	source
Account	t-1582139188
Size	5.24 MB
Creation Time	2020-02-19 12:15:59 PST
Modified Time	2020-02-19 12:15:59 PST

### Replicated Copies

Node	Disk Path
99-97	/var/local/rangedb/2/p/06/0B/00nM8H\$ TFbnQQ CV2E
99-99	/var/local/rangedb/1/p/12/0A/00nM8H\$ TFboW28 CXG%

### Raw Metadata

```
{
  "TYPE": "CNT",
  "CHND": "A12E96FF-B13F-4905-9E9E-45373F6E7DA8",
  "NAME": "testobject",
  "CBID": "0x8823DE7EC7C10416",
  "PHND": "FEA0AE51-534A-11EA-9FCD-31FF00C36D56",
  "PPTH": "source",
  "META": {
    "BASE": {
      "PAWS": "2",

```

5. Confirm that the object is stored in the correct location or locations and that it is the correct type of copy.



If the Audit option is enabled, you can also monitor the audit log for the ORLM Object Rules Met message. The ORLM audit message can provide you with more information about the status of the ILM evaluation process, but it cannot give you information about the correctness of the object data's placement or the completeness of the ILM policy. You must evaluate this yourself. For details, see the information about understanding audit messages.

### Related information

[Review audit logs](#)

[Use S3](#)

[Use Swift](#)

## 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.