

Applying Automation Policies

<https://campus.barracuda.com/doc/90443304/>

Creating Rules to Automatically Include Devices

Automatic approval rules determine which devices are eligible to have the automation policy applied. For example, if you are creating an automation policy for Windows servers only, you can set up an automatic approval rule to include devices with the word "**server**" in the OS name.

The approval rules do not come into effect until the automation policy has been applied, either by adding it to a service and then applying the service to a group or site, or by adding it to a service in a service plan, which can also be applied to a group or site.

The process for setting up approval rules is the same for automation policies as it is for all other policy types (i.e, monitoring, patch, and Avast Antivirus). For more detailed instructions on setting up automatic approval rules, including examples, see [Creating Automatic Inclusion Rules for Monitoring Policies](#).

1. In Service Center, click **Configuration > Policies > Automation**.
2. Click the name of the automation policy to which you want to create an automatic inclusion rule.
3. Click the **Automatic Application** tab.
4. Create the automatic inclusion rule by clicking **Add** to create a rule.
5. Repeat step 4 until the rule is complete.
You can add up to a maximum of 15 rules.
6. Click **Save**.

Adding Devices or Groups to an Automation Policy

1. In Service Center, click **Configuration > Policies > Automation**.
2. Click the name of the automation policy to which you want to add devices or groups.
3. Click the **Manual Application** tab.
4. Do one of the following to apply the automation policy to a group or device:
 - In the **Applied Groups** area, click **Add**. Filter on the **Group Type**, if desired. Click the group and click **OK**.
 - In the **Applied Devices** area, click **Add**. Filter the list of devices. Select the check box beside the device and click **OK**.

You can view the automation policies applied to service and site groups on the **Groups** page, by going to **Configuration > Groups**, clicking the group name, and then clicking the **Policies** tab. For more information, see [Viewing the Policies Applied to a Group](#).

Removing Devices or Groups from an Automation Policy

1. In Service Center, click **Configuration > Policies > Automation**.
2. Click the name of the automation policy to which you want to add devices or groups.
3. Click the **Manual Application** tab.
4. Do one of the following:
 - To select one device or group at a time, select the check box that corresponds with each device you want to remove.
 - To select all the devices or groups at once, select the check box at the top of the column.
5. Click **Remove**.

Excluding Devices from an Automation Policy

You can exclude specific devices from an automation policy. When you add a device to the exclusion list, it will never have this automation policy applied, even if the device meets the criteria outlined in the automatic application rules, and the automation policy is applied to the site or group to which the device belongs.

1. In Service Center, click **Configuration > Policies > Automation**.
2. Click the name of the automation policy from which you want to exclude devices.
3. Click the **Excluded Devices** tab.
4. Click **Add**.
5. Use the filters at the top to narrow your selection, and click **Filter**.
6. Select the check box beside each device you want to exclude from the policy.
7. Click **OK**.
8. Click **Save**.

You can exclude multiple devices in a site or group by selecting **Site** or **Group** from the **Filter By** list, and then selecting the check box at the top of the list of returned devices to exclude all devices listed.

Renaming an Automation Policy

1. In Service Center, click **Configuration > Policies > Automation**.
2. Click the name of the automation policy that you want to edit.
3. Click **Modify**.
4. Type a new name in the **Policy Name** box.
5. Click **Save**.

Deleting an Automation Policy

When you delete an automation policy, you are removing the automated task from any devices that

have the policy applied.

1. In Service Center, click **Configuration > Policies > Automation**.
2. Select the check box beside the automation policy you want to delete.
3. Click **Delete**.

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