Creating Automatic Inclusion Rules for Monitoring Policies

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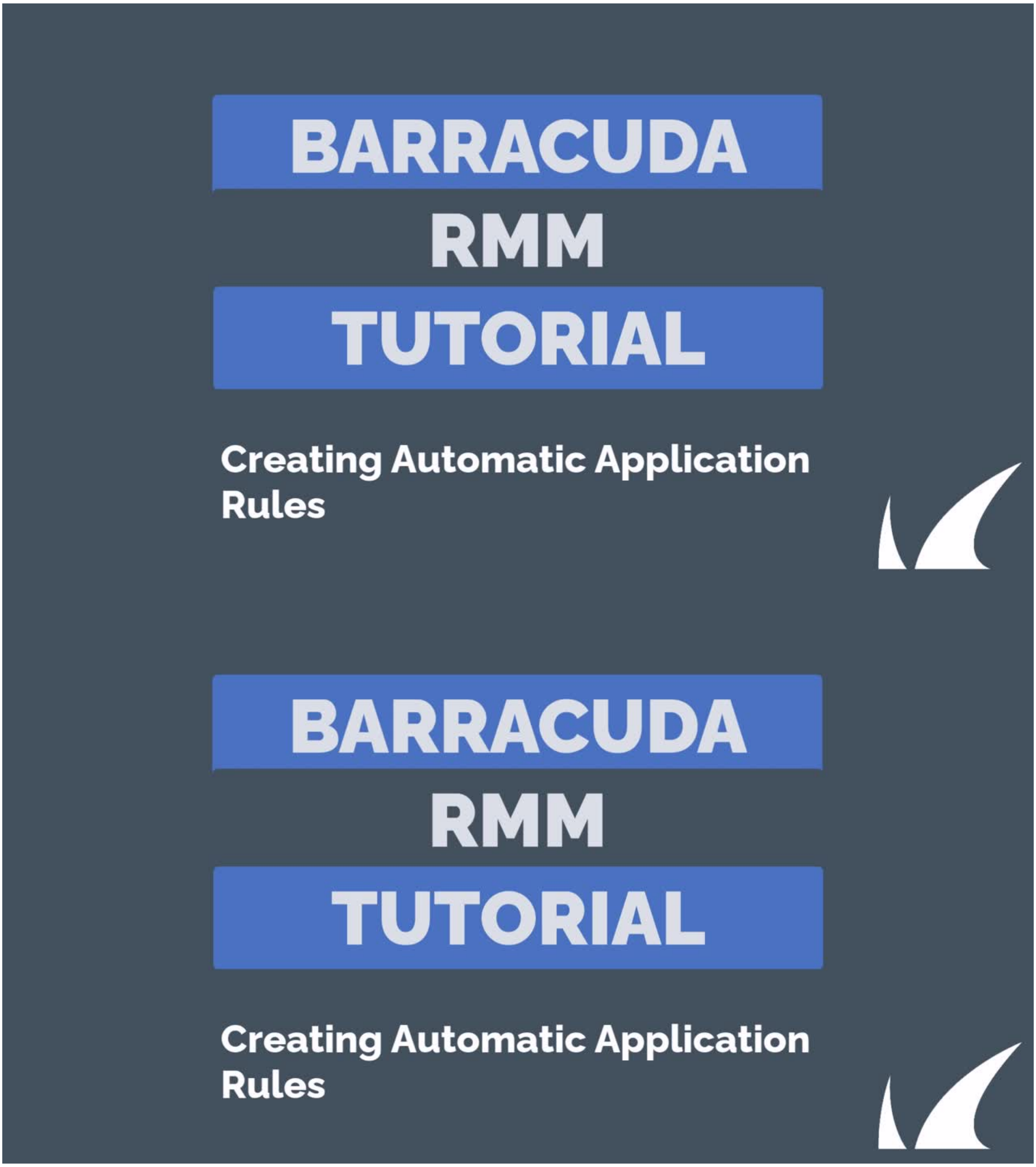
You can create automatic inclusion rules to define the criteria a device must meet to be monitored by the monitoring policy. Devices that match the inclusion rules are automatically monitored. If a device no longer meets the rule criteria, it is automatically removed from monitoring. Automatic inclusion rules only go into effect when you add the monitoring policy to a service, which is then applied to a site or group either directly or as part of a service plan. You can also associate the monitoring policy with a site or service group. For more information on creating and managing service plans, see Creating Service Plans.

Rules are created by first defining **AND** and **OR** statements, then by adding rules to the statements. For example, if you are creating a rule to automatically monitor all devices running on a **Windows 7** operating system, in the default **AND** group, you would specify that the **OS Name** contains "**Windows 7**".

To create a rule that specifies that the device must either have a **Windows 7** or **Windows 2008** operating system, you would change the **AND** group to an **OR** group, and then add a second rule that specifies that the **OS Name** contains "**Windows 2008**".

For more examples of automatic inclusion rules, see Automatic Inclusion Rule Examples.

Setting up Automatic Application Rules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Planning out automatic inclusion rules

Creating automatic inclusion rules will usually be simple, but because you can put together very sophisticated rules, it's best to come up with a statement about the rule before you get started. Here are some example rule statements:

- If the device must be a firewall, the rule statement would simply be: **firewall**.
- If the chassis type must be a laptop, and the operating system must be **Windows 7**: **(Chassis type is laptop) AND (OS is Windows 7)**.
- The network service must be **HTTP** or **HTTPS**: **(HTTP) OR (HTTPS)**.
- The domain role must be a member workstation or a member server, and the operating system must be **Windows 7** or **Windows 2008**: **(Member Workstation or Member Server) AND (Windows 7 or Windows 2008)**.

To create an automatic inclusion rule for a monitoring policy

1. In Service Center, click **Configuration** > **Policies** > **Monitoring**.
2. Click the name of the monitoring policy to modify.
3. Click the **Automatic Application** tab.
4. Create the conditional statements. See Creating condition statements for a monitoring policy automatic inclusion rule .
5. Create the inclusion criteria. See Creating inclusion criteria for a monitoring policy automatic inclusion rule .
6. Preview the rule. See Previewing an Automatic Inclusion Rule .

Creating condition statements for a monitoring policy automatic inclusion rule

Set up the conditional structure of the rule by adding **AND** or **OR** statements. By default, rules include a single **AND** statement.

- Set up the conditional statements by doing any of the following:
  - To create a single **AND** statement to which you can add one or multiple rules, do nothing.
  - To create a single **OR** statement, right-click the existing **AND** statement and select **Modify**. From the **Type** list, select **Or**.
  - To add an **OR** statement below the existing **AND** statement, select the **AND** statement and click **Add**. From the Type list, select **Or**.

Creating inclusion criteria for a monitoring policy automatic inclusion rule

For each **AND** or **OR** statement, you must define at least one inclusion criteria.

1. Select the **AND** or **OR** statement to which you want to add inclusion criteria.
2. Click **Add**.
3. From the **Type** list, select **Rule**.
4. From the **Rule** list, select one of the following:

Chassis Type Filter devices according to chassis type, such as laptop, desktop, notebook, etc. Select either **Equals** or **Not Equal** from the **Operator** list, and select a chassis type from the **Value** list.
Device MAC Address Filter devices by the **MAC** address. Select either **Equals**, **Contains**, or **Starts With** from the **Operator** list, and type the **MAC** address in the **Value** box.
Device Model Filter devices by providing the device model. Select either **Equals** , **Not Equal**, **Contains** , **Not Contain** , or **Starts With** from the **Operator list** and type the device model name in the **Value box.**
Device Role Category Filters devices by device role category. As a best practice, use this rule when you are applying service plans to shared site groups; the pre-built shared site groups in Barracuda RMM are designed to be applied to the device roles defined in this rule. Select **Equals** or **Not Equal** from the **Operator** list, and then select **Network Device**, **Unknown**, **Windows Server**, or **Windows Workstation**.
Hardware Type Filters devices according to hardware type, including desktop, laptop, printer, rack mount, and others. From the **Value** list, select the hardware type.
Has Warranty Information Filter devices by whether warranty information exists. Searches for devices with both custom and vendor warranties. Supported vendors include **Acer**, **Compaq**, **Dell**, **Gateway**, **Hewlett-Packard**, **HP**, **IBM**, **Lenovo**, and **Toshiba**. Selecting this option from the **Rule** list includes all devices with warranty information.
Installed Memory (in GB) Filter devices by the installed memory. Select either **Greater Than** or **Less Than** from the **Operator** list, then type a number in the **Value** box, in **GBs**.
IP Address Filter devices by the **IP** address. Select either **Equals**, **Not Equal**, **Greater Than**, **Less Than**, **Contains** or **Starts With** from the **Operator** list, then type an **IP** address in the **Value** box.
Is a Printer Filter devices to include printers. Selecting this option from the **Rule** list includes all printers.
Is a Virtual Machine Filter devices to include virtual machines. Selecting this option from the **Rule** list includes all virtual machines.
Logical Drive Size (GB) Filter devices by the logical drive size. Select either **Greater Than** or **Less Than** from the **Operator** list, then type a number in the **Value** box, in **GBs**.
Manufacturer Filter devices by the manufacturer. Select **Equals**, **Not Equal**, **Contains**, **Not Contain**, or **Starts With** from the **Operator** list, then type a manufacturer name in the **Value** box.
Network Role Filter devices by the network role, such as firewall, router, etc. Select a network role from the **Value** list.
Network Service Filter devices by standard network service ports, including commonly-used services such as **HTTP**, **SMTP**, and **POP3**. Custom ports for network services are not filtered. Select a network service from the **Value** list.
OS Family Filters devices by OS family, for example, **Android**, **iOS**, **Linux/ Unix**, and **Windows**. From the **Value** list, select an OS family.
OS Name Filter devices by the operating system name, for example, **Windows Server 2008 Standard**. Select **Equals**, **Not Equal**, **Contains**, **Not Contain**, or **Starts With** from the **Operator** list, then type an operating system name in the **Value** box.
OS SKU Filter devices by their unique operating system **SKU (Stock Keeping Unit)**. For example, **Windows 7** has several SKUs, including **Home Premium**, **Professional**, **Home**

Basic, and **Enterprise**. Select either **Equals** or **Not Equal** from the **Operator** list, then select a **SKU** from the **Value** list.

The **OS SKU** rule doesn't apply to **Windows 2003** and **XP** operating systems.

OS Version Filter devices by the operating system version, which you can determine by executing the **winver** command. For example, for the **Windows 7 Enterprise** operating system, the **OS** build version is **7601**. Select either **Equals** , **Not Equal**, or **Starts With** from the **Operator** list, then type an operating system version in the **Value** box.

Responds to SNMP Filter devices by whether they respond to **Simple Network Management Protocol (SNMP)** monitors. From the **Value** list, select **True** to include devices that respond to **SNMP** monitors, or **False** to include devices that do not respond.

Responds to Specific OID Filter devices to include those that respond to a specific **SNMP** object identifier (**OID**). From the **Value** list, select an **OID** type, such as **Dell Server** or **HP Switch**.

Responds to SSH Filters devices by whether they respond to **Secure Shell (SSH)** monitors. From the **Value** list, select **True** to include devices that respond to **SSH** monitors, or **False** to include devices that do not respond.

Responds to WMI Filters devices by whether they are **WMI** enabled. From the **Value** list, select **True** to include devices are WMI enabled, or **False** to include devices that are not.

Responds to WS-MAN Filter devices by whether **WS-MAN** is enabled, which is an option for **WMI** connectivity. Select **True** or **False** from the **Value** list.

SNMP sysDesc Filter devices by the **SNMP** system description. For example, to include **Apple macOS** devices, you could enter "**Darwin**". Select either **Equals**, **Not Equal**, **Contains**, **Not Contain**, or **Starts With** from the **Operator** list, then type an **SNMP** system description in the **Value** box.

SNMP sysObjectID Filter devices by the **SNMP system object ID**. For example, **Cisco ASA** series devices each have unique **sysObjectIDs**. To include **Cisco ASA 5505** devices, enter the **sysObjectID** for this device type (1.3.6.1.4.1.9.1.745). Select either **Equals**, **Not Equal**, **Contains**, **Not Contain**, or **Starts With** from the **Operator** list, then type an **SNMP sysObjectID** in the **Value** box.

Software - Mac and Software - Windows Filter devices by the **Mac** or **Windows** applications that are installed. You can filter by software name, and optionally you can also filter by the software version.

1. From the **Operator** list, select either **Exists** or **Does Not Exist**.
2. Under **Software Name**, select an operator from the **Operator** list and type the software name in the **Value** box.
3. To further filter by software version, select the **Include Software Version** check box. From the **Operator** list that appears, select an operator and type a version number in the **Value** box.

System Role Filter devices by system role, for example, **File Server** or **Routing Service**. Select **Equals** or **Not Equal** from the **Operator** list, and then select a system role from the **Value** list.

Windows Service Name Filter devices by the **Windows Service Name**. To determine the **Windows Service Name**, view the device's **Properties** Page. Select either **Equals**, **Not Equal**, **Contains**, **Not Contain**, or **Starts With** from the **Operator** list, then type a **Windows Service Name** in the **Value** box.

5. **Domain Role** Filter devices by the domain role. Select either **Equals** or **Not Equal** from the **Operator** list and select a domain role from the **Value** list, such as **Member Workstation** or **Primary Domain Controller**.
6. Click **Add**.
7. Click **Save**.

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