

## Creating a Delivery Schedule for a Report

<https://campus.barracuda.com/doc/27758/>

Delivery Schedules define when to automatically run reports.

### To name the scheduled report

1. In Service Center, click **Reporting > Delivery Schedules**.
2. Click **Create Schedule**.
3. In the **Status** tab, type a name for the delivery schedule.

### To select the report to schedule and the output format

1. Click the **Settings** tab.
2. Select either **Site**, **Device** or **Multi-Site** depending on the type of report you're scheduling. The **Report** list is filtered based on your selection. For example, if you select the **Site** option button, then only site reports appear in the list. Similarly, if you select the **Multi-Site** option button, only aggregate site reports appear.
3. To locate the report, select a category from the **Category** list and then select the report from the **Report** list.  

You must include a report.
4. Select one of the following output formats for the report:
  - Portable Document Format (PDF)** This format becomes an attachment in an email.
  - Web Archive (MHTML)** This format embeds right into an email. This web page archive format combines resources that are typically represented by external links (such as images, Flash animations, Java applets, audio files) together with HTML code into a single file.
  - Excel Workbook (XLS)** This format becomes an attachment in an email. This format is useful if you want to edit or manipulate the data in Microsoft Excel.
  - TIFF** This format becomes an attachment in an email.
  - XML** This format becomes an attachment in an email. Saving the report in XML format allows you to import the report data into another system. For example, if you have developed a web portal that clients can log into and view information about their company such as, reports, performance statistics, etc. XML is a clean way of exporting and importing data from one system to another.
  - CSV** This format becomes an attachment in an email. This format can be loaded into any spreadsheet program. You can also use .CSV files to import the data into another system.
  - Microsoft Office Word** This format becomes an attachment in an email. This format can be loaded into Microsoft Word.
5. If required, select the time zone and locale for the report.  
If you are creating a report for a customer in a different time zone or locale, select their time zone and locale.

### To select sites and devices to include in the scheduled report

1. Click the **Subjects** tab.

Depending on whether you selected **Site** or **Device** in the **Settings** tab, you can filter what sites and devices to include in the report.

If you selected the Multi-Site option button when selecting the report, then you cannot select any sites on this page because you select the sites when you import the aggregate site reports. See [To use predefined aggregate reports](#).

2. Select the check box for each subject to include and click the >> button.  
Make sure to select the site when reporting against service groups or devices so that the recipient only sees information appropriate to their site.

For site or device reports, you must include at least one subject.

#### To set the scheduled report to be emailed or archived

##### Best Practice

Email the report to yourself or archive so you have the exact report that was sent to your customer.

1. Click the **Delivery** tab.
2. To archive a copy of the report to the Service Center database so the report can be viewed from the **Report History**, select the **Save Report to Archive** check box.
3. To email a copy of the report, select the **Email Report** check box and then do the following:
  1. Select a priority for the email message from the **Priority** list.
  2. Type the email address of each recipient (separating recipient addresses with a semicolon), or click the address book icon to open the **Email Contacts** dialog box, where you can select each Service Center user by enabling the corresponding check box.
  3. Type the email subject line contents in the **Subject** box.
  4. Type the email message in the **Email Message** box.

You must include at least one delivery method. For each site included in the **Subjects** tab, you must include at least one email address. You must include a subject for the email. Ensure you enter a valid email address. If you selected the **Multi-site** option button when selecting the report, then you must select the sites to include in the report when you import the aggregate site reports. See [To use predefined aggregate reports](#).

#### To schedule when to deliver the report

1. Click the **Schedule** tab.
2. Click either the **Daily**, **Weekly**, **Monthly**, or **Quarterly** option button to define how often you want the report delivered.

A quarterly report runs three months after you configure it, rounding to the closest month.
3. Use the corresponding schedule section that appears based on the selected option button to further define the delivery schedule.

4. To set how many days of data to include in the scheduled report, select the reporting period.
5. Click **Save**.

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