How to Use the Report Generator

https://campus.barracuda.com/doc/77402830/

The Report Generator enables you to see the data you gather in ways that are helpful for you and your organization.

Reports Included with Security Awareness Training

Security Awareness Training includes the following preconfigured report templates. All reports are available in both Word and PDF, except where otherwise noted.

- ‡**Benchmark Results Overview** – Select a campaign to see a comprehensive view of your benchmark campaign.
- ‡**Campaign Results Overview (HTML only and Word/PDF)** – Select a campaign to see a comprehensive view of your campaign.
- **Campaign Comparison** – Compares results of two campaigns. You can choose how the data is grouped. Formerly known as *Campaign vs. Campaign*.
- **Detailed User Report** – Select a campaign to see how each user performed.
- **Multi-Campaign Repeat Clicker Report** – Select one or more campaigns to see how many and which individuals interacted with which campaigns, along with how you want to group the data. Formerly known as *Multi-Campaign Repeat Offender Report*.
- **Multi-Plan Repeat Clicker Report** – Select one or more plans to see how many and which individuals interacted with which plans, along with how you want to filter and group the data. Formerly known as *Multi-Plan Repeat Offender Report*.
- **Plan Comparison** – Compares results of two plans. You can choose how the data is grouped. Formerly known as *Plan vs. Plan*.
- ‡**Training Campaign Results Overview (HTML only and Word/PDF)** – Select a campaign to see campaign statistics as well as information about the campaign itself.

‡These reports:

- Are automatically sent as Word documents within a day of a campaign's cut-off date and time, based on the type of campaign you are running. Specify report recipients in Notification Settings.
- Are the same Quick Reports that you can generate from the Campaign Manager, as described in Creating a Quick Report.

Creating a Report

To use the Report Generator:

1. Navigate to **Results > Report Generator**.
2. Locate the **Report Name** for which you want to generate a report and click the view icon to its left. If needed, you can search for a specific **Report Name** or **Report #** in the filter panel, then click **Refresh** to see the search results.
3. On the next page, specify the required information.
   Optionally select the scope for the report, specifying the options available.
   Note that options might be different for different reports.
    - **Save Report As** – Select the output format for this report: HTML (default), PDF, or DOCX (Microsoft Word). If you choose not to take action in this section of the page, the report will generate as HTML.
    - **Campaign Name**– The Campaign Name for which you want to generate a report. Comparison reports require names of two or more campaigns you want to compare.
    - **Plan** – For certain reports, one or more Plans associated with the data for which you are creating a report.
4. Optionally, click **Show Advanced Filters** to view additional settings. These settings are rarely used, but are available should you choose to use them. Note that options might be different for different reports. Advanced Filters include:
    - **Filter By Field** – Select if you want to filter the report to include only certain information. Here, select the field to filter by, like `Organization Area`, `Tenure`, or `State`. You must specify a **Value** in the next field.
    - **Filter By Value** – Use together with the **Filter By Field** to limit the output of your report. Select the value to match for the field you specified above. For example, for the `Organization Area` field, you might specify `Accounting`.
    - **Group by** – Select the address book field by which you want to group the report. For example, you might choose to group the report by `Organization Area` or `Organization Level`, so you can see how various departments or managerial levels handled the campaign.
    - **Minimum IRD Wrap Level** – Enter the number of levels deep this message was wrapped in the message sent to the Incident Response Dashboard (IRD). Leave blank or enter 0 to include all wrap levels. This is only relevant if you are reporting on Incident Response metrics. It is not relevant for training or simulation metrics.
    - **Include Bounced emails in the sent count** – Select the check box to include bounced emails in the sent count. In most cases, bounces should *not* be included.
    - **Sequence By Field** – Specify another field of the Address Book – different from the **Filter By Field** – to further target the report. For example, `Organization Level`. Note that specifying a **Sequence By Field** creates multiple reports - one for each unique value for that field in the Address Book for that campaign. So for `Organization Level` , a separate report is created for each `Organizational Level`, including `Manager`, `Director`, and so on.
    - **Sequence Range Start/End** – If needed, use with Sequence By Field to specify a range of acceptable values, limiting the number of reports created.
5. At the top of the page, click **Submit**. The page refreshes.
6. For some reports only: Select elements you want to include as pages/sections of your report.

You might choose to include the **Unfiltered Summary Report Section** for an overall view of the data. Click **Submit** again.

7. Links to reports are presented in a list. Click a report to download it. Open the report as you would open other items you download.
   Click **Access All Recent Print/Export Files** to view a list of reports you created recently. In this list, click the download icon to download a report.
   Note that some reports might take a few minutes to create. While the report generates, you can continue working on other pages within Security Awareness Training or log off. When the reports are ready, a notification appears as a red dot over the alert bell  in the top right of the screen.
   To obtain these reports:
    1. Click the bell icon and select **Export/Print Files**.
    2. Locate the report you generated, then click it to download the Microsoft Word (DOCX) or PDF file. After you download the report, it is removed from the list.
       Click **Access All Recent Print/Export Files** to see other recently created reports. You can download reports from this list.

Figures

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