

Step 7: Schedule Report Delivery

<https://campus.barracuda.com/doc/84313082/>

Background

You can create reports to deliver quality information about your service to your customers.

Predefined reports Barracuda Managed Workplace comes with many site and device reports, and even multi-site reports, that are ready to use and customize.

For example, the Executive Summary Report shows an overview of a site across workstations and includes a network health score, top problem devices, an alert summary, and work completed, among other things.

Delivery Schedule Delivery schedules define when to automatically run reports and send them to your customer or your staff.

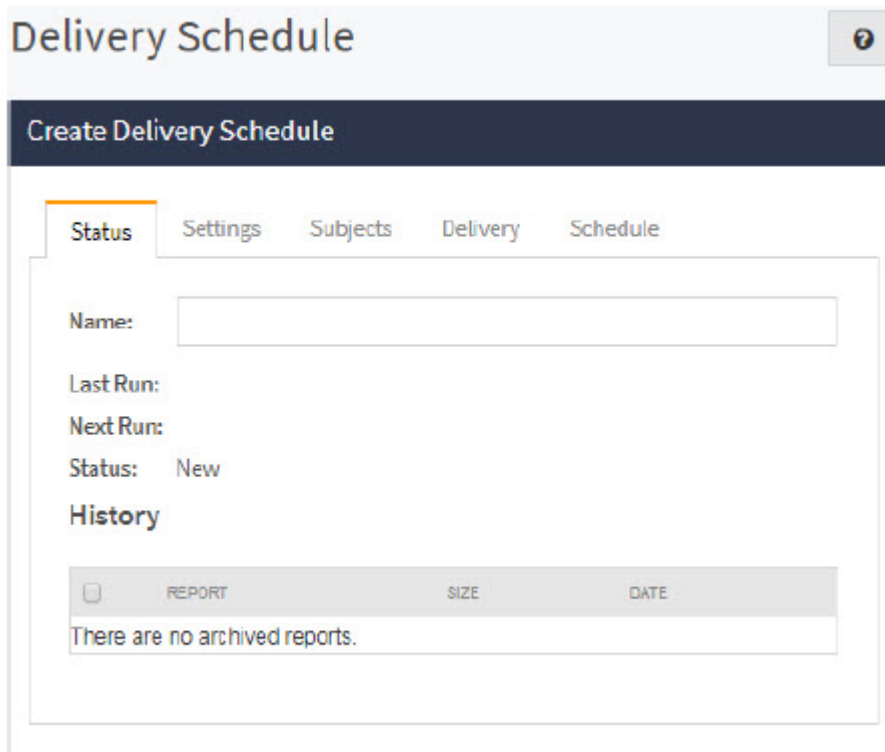
Try This—Schedule a Report

You want to demonstrate to customer that your service is worthwhile, so every month you want to send the Executive Summary report.



Set up a monthly Executive Summary report

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



The screenshot shows the 'Create Delivery Schedule' form with the 'Status' tab selected. The form includes fields for Name, Last Run, Next Run, and Status (set to 'New'). Below these is a 'History' section with a table header containing 'REPORT', 'SIZE', and 'DATE'. The table body contains the text 'There are no archived reports.'

REPORT	SIZE	DATE
There are no archived reports.		

4. Click the **Settings** tab.
5. In the **Type** section, select *Site*.
6. From the **Category** list, select **Service Delivery**.
7. From the **Report** list, select **Executive Summary**.
8. To deliver this report as a PDF, in the **Format** field, select **PDF**.

Create Delivery Schedule

Status **Settings** Subjects Delivery Schedule

Select the report to deliver:

Type:
☒ Site
☐ Device
☐ Multi-site

Category: (Uncategorized) ▼

Report: 1 site office keys ▼

Logo: None

Format: Portable Document Format (PDF) ▼

Time Zone: (GMT-05:00) Eastern Time (US & Canada) ▼

Locale: English (United States) ▼

Font: Use Default (Verdana) ▼

9. Click the **Subjects** tab.
10. Select the check box for your site and click the chevron (>>) button.

Delivery Schedule

Create Delivery Schedule

Status Settings **Subjects** Delivery Schedule

Select the Sites on which to report:
For each site selected, a separate report will be generated.

Available Sites:

<input type="checkbox"/>	Site
<input type="checkbox"/>	ABC Medical
<input type="checkbox"/>	Agent Only
<input type="checkbox"/>	Astoria
<input type="checkbox"/>	Bay CPA
<input type="checkbox"/>	Montreal Imports
<input type="checkbox"/>	Umbrella Corporation

>>

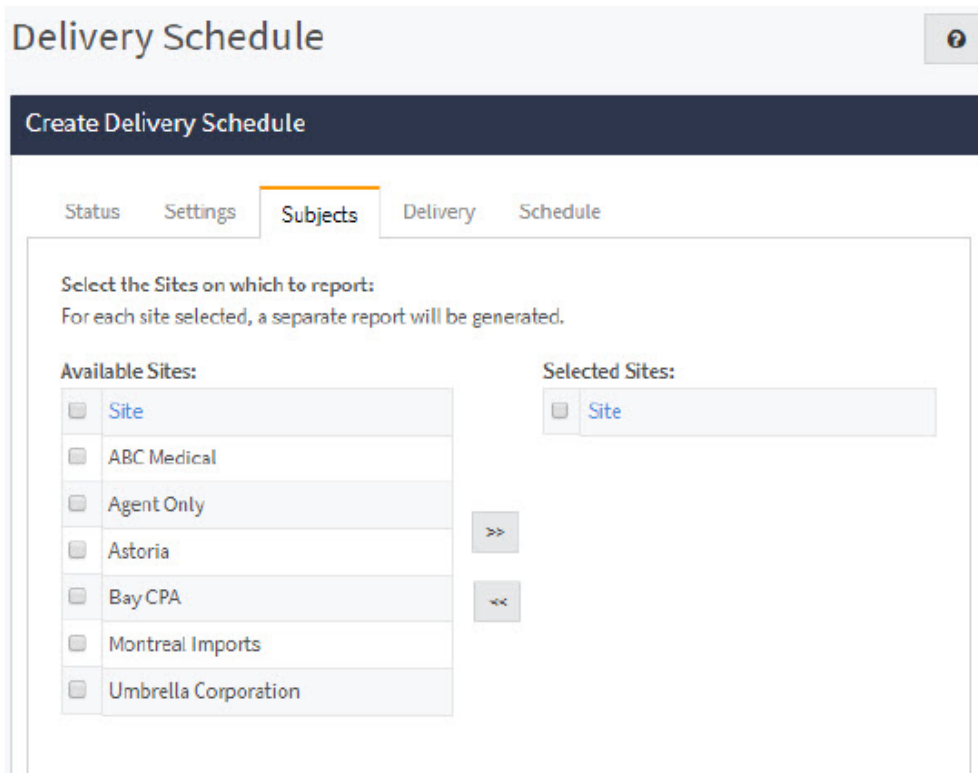
<<

Selected Sites:

<input checked="" type="checkbox"/>	Site
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11. Click the **Delivery** tab.

12. To keep a copy of the report for viewing later, select the **Save Report to Archive** check box.
13. Select the **Email Report** check box.
14. Select a priority for the email message from the **Priority** list.
15. 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 Service Center users by selecting the corresponding check box.
16. In the **Subject** box, type the email subject line contents.
17. In the **Message** box, type the email message.



The screenshot shows the 'Delivery Schedule' dialog box with the 'Subjects' tab selected. The dialog has a title bar 'Delivery Schedule' and a sub-header 'Create Delivery Schedule'. Below the header are five tabs: 'Status', 'Settings', 'Subjects' (active), 'Delivery', and 'Schedule'. The main content area is titled 'Select the Sites on which to report: For each site selected, a separate report will be generated.' It contains two lists: 'Available Sites:' and 'Selected Sites:'. The 'Available Sites:' list includes checkboxes for 'Site', 'ABC Medical', 'Agent Only', 'Astoria', 'Bay CPA', 'Montreal Imports', and 'Umbrella Corporation'. The 'Selected Sites:' list currently contains 'Site'. Between the two lists are two buttons: '>>' and '<<'. There is also an information icon in the top right corner of the dialog.

18. Click the **Schedule** tab.
19. Click the **Monthly** button.
20. In the **Day of Month** field, type 1.
21. Click the clock icon and select **8:00 am** from the Time Picker.
22. In the **Reporting period** section, select 1 and *months* from the lists.

Delivery Schedule

Create Delivery Schedule

Status

Settings

Subjects

Delivery

Schedule

Create a schedule to deliver the report:

☐ Daily
 ☐ Weekly
 ☒ Monthly
 ☐ Quarterly

Monthly Schedule

Day of Month:

1

Start Time:

Select the number of days of data in the report:

Reporting Period: 1 months

23. Click Save.

Delivery Schedules

Create Schedule

Category: (Uncategorized)

1

Page size: 20

2 items in 1 pages

NAME	SUBJECTS	LAST RUN	STATUS	NEXT RUN		
Automation Details for Multi-Site	2	4/16/2018 4:30:01 PM	Report sent to archive; Report sent to archive;	4/23/2018 4:30:00 PM	Run Now	✗
Exec Summary - Umbrella Corporation	1		New - Not Executed	5/1/2018 8:00:00 AM	Run Now	✗

Every first day of the month at 8:00 a.m., the Executive Summary Report will be sent to the emails you specified.

Tip: You can click **Run Now** to run a delivery schedule immediately

What's Next

Now you can check the security of a site with Site Security Assessments.

Figures

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