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## Creating Report Policies

<https://campus.barracuda.com/doc/89620904/>

A report policy includes the following:

- one or more reports
- the schedule on which the reports will run
- the intended report email recipients, and the email subject and message
- formatting options such as locale, time zone, output format, and font
- for device report policies, the rules that define what type of devices will be included in the reports
- manually added devices and groups

When you create a report policy, you specify whether it will include site reports or device reports. For report policies that include site reports, when the policy is added to a service in a service plan and applied to a site, the policy will be automatically applied to all devices at a site. For this reason, you cannot create automatic inclusion rules for a report policy that includes site reports.

### To create a report policy

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1. In Service Center, click **Configuration > Policies > Reporting**.
2. Click **New**.
3. From the list, select whether to create a site report or a device report.
4. Click **Add**.
5. Provide a policy name and description.
6. Click **Create**.
7. Click the **Settings** tab.
8. Click **Modify**.

### To add reports to a report policy

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1. In the **Reports** area, click **Add**.
2. Select the check box beside each report you want to add, and click **Add**.

### To schedule when the reports will run

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1. In the **Schedule** area, in the **Start Time** box, type a start time for when reporting will begin to run. Alternatively, you can click the clock icon to select a time from the list.
2. In the **Recurrence Pattern** area, select whether you want reporting to run daily, weekly,

monthly, or quarterly.

3. In the **Select the number of days of data to run in the report** area, indicate the time period the report will cover by selecting a number from the first list, and either **days**, **weeks**, or **months** from the second list.

## To configure email settings

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You can configure whether to email reports to a site's contact, and you can provide the subject line and email message content.

The report policy will use the site contact's email address as defined in Site Management. To verify that a site has an email contact, go to **Site Management > Sites**, and click the site name. On the **General** tab, in the **Site Details** section, click **Modify** to add an email address if one does not already exist.

1. In the **Email** area, click the **Email Reports to the site's contact** check box. This check box is selected by default.
2. In the **Subject** box, type the subject line. By default, the **Subject** box is populated with the name of the report policy. You can change this if desired.
3. In the **Message** box, type the email message.

## To set formatting and regional options

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You can set formatting and regional options such as locale, time zone, font, and output file.

1. In the **Options** area, 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 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.

2. If required, select the time zone and locale for the report policy.  
For example, if you are creating a report policy that will be applied to customers in a different time zone or locale, select their time zone and locale.
3. From the **Font** list, select the font you want the report to use.
4. Click **Save**.

**See also**

- [Applying Report Policies](#)
- [Viewing Report Policy Execution Results](#)

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