

## Creating Automation Policies

<https://campus.barracuda.com/doc/90443310/>

An automation policy includes the following:

- a script or script package
- a schedule for when the script will run, either by using an execution schedule, or by creating a custom schedule
- automatic inclusion rules that determine which type of devices on which the script will run
- optionally, manually applied sites, groups, and devices
- optionally, devices that are excluded from the policy

The automated tasks that are created using an automation policy are displayed in the **Calendar**, in addition to any scheduled tasks you have created by going to **Automation > Calendar**, selecting a time block, and clicking **Schedule**.

After creating an automation policy, you can add it to a service for use in a service plan. For more information, see [Creating Services](#).

### To create an automation policy

1. In Service Center, click **Configuration > Policies > Automation**.
2. Click **New**.
3. Provide a **policy name** and **description**.
4. Click **Create**.
5. Click the **Settings** tab.
6. Click **Create**.

### To select the script or script package that will run

1. From the **Choose what to execute** list, select a favorite script, or select **(Item from library)** and then do the following:
  1. From the **Choose an item from the library** list, filter the list of scripts in the **Choose an item by name** list by selecting the operating system on which the script runs. Choose from **Windows, Mac OS, or Unix/ Linux**.
  2. From the **Choose an item by name** list, select a script or script package.

### To run the automation policy using an execution schedule

When you set up an automation policy to use execution schedules, you must select whether the policy will use the daily, weekly, or monthly schedule for automated tasks, as defined in the execution schedule.

1. In the **Schedule** area, select the **Run as per applicable Execution Schedule** option button.

For more information about execution schedules, see [Setting Up Execution Schedules](#).

2. Select one of the following option buttons:
  - **daily**
  - **weekly**
  - **monthly**

#### To set up an automation policy schedule that overrides applicable execution schedules

1. In the **Schedule** area, select the **Override Execution Schedules** option button.
2. In the **Start Time** box, type a start time for when the automated task will begin. Alternatively, you can click the clock icon to select a time from the list.
3. Specify how often to run the task by selecting one of the following:
  - To run a task daily, select the **Daily** option button, and then specify how often the task will run each day by selecting a frequency from the **Run daily** list. By default, daily tasks run once a day.
  - To run a task weekly, select the **Weekly** option button. Then specify what day or days to run the task.
  - To run a task monthly, select the **Monthly** option button. Then select either a specific date or a recurring day in the month.

#### To set timeout limits for the automation policy

1. Click **Show Advanced Configuration**.
2. In the **Timeouts** area, set the following timeouts:
  - To set a timeout for the execution of the task, from the **Execution** list select the length of time the task can execute before the timeout occurs.
  - To set a timeout for when the device is unreachable, from the **Device Unreachable** list select the length of time the task can be unreachable before the timeout occurs.

#### To wake computers to run a task

You have the option to wake a computer if it is asleep so that the task can be run at the scheduled time.

1. Click **Show Advanced Configuration**.
2. In the **Miscellaneous** area, click the **Wake computers if asleep** check box.

#### To add an alert if the script fails to be executed or returns output that is not considered a successful execution

1. Click **Show Advanced Configuration**.
2. In the **Alerts - Execution Results** section, click **Add**.
3. Type a title for the alert.
4. Optionally, type a description for the alert.
5. In the **Alert Rule** area, click **Add**.

The options for adding an alert rule differ depending on whether you are scheduling a script or an automation package to run.

6. If you are scheduling a script to run as a task, select the parameters that will generate an alert:
  - Return Code** Indicates the execution outcome of the script. The return codes can vary because they can be defined inside the script itself.
  - Standard Output** Indicates the output produced, if any, by a task to the **StdOut**. Standard output is used to express anything the script needs to communicate. This can be error messages, success messages, or lists of data.
  - Standard Error** Indicates the error produced by the script.

The **Return Code**, **Standard Output**, and **Standard Error** are values that are scripted or programmed into the script or executable that is being run.
7. Click **Save**.

#### To add an alert for delivery failure

1. Click **Show Advanced Configuration**.
2. In the **Alerts - Delivery Failure** area, click **Add**.
3. Do the following:
  - To add an alert category when a script fails to be delivered, click **Categorize Alert** and add a category from the list.
  - To remove an alert category for when a script fails to be delivered, click **Categorize Alert** and remove a category from the list.
  - To create a trouble ticket when a script fails to be delivered, select the **Create Trouble Ticket** check box.
  - To set the alert to self-heal when a script fails to be delivered, select the **Self-Heal** check box. To specify the setting for self-heal, click the **Self-Heal** link. To clear the associated **Trouble Ticket**, ensure the **Clear Trouble Ticket** check box is selected. To send a notification, select the **Enable Self-Heal Notification** check box and specify the time delay. Then click **Save**.
  - To send an email when a script fails to be delivered, select the **Send Email** check box and select either **All Users** to send an email to all users whose role is to receive alert notifications or select **Specify Emails** to specify certain recipients who should be notified. In the **From** box, type the email address from where the alert is emailed.
  - To escalate an alert if an alert has not been cleared or self-healed in a set amount of time, select the **Escalate Alert** check box and select a time after which the **Alert Escalation** will take effect. Select the **Send Email** check box and follow the instructions in the previous bullet.
  - To automate reactions to an alert, select the **Run Script** check box and select the **Category** and **Script** name, and set any parameters if necessary.
4. Click **Save**.

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