

## Understanding Policies and Services

<https://campus.barracuda.com/doc/99618991/>

This page provides the following topics:

- [Policies and Services](#)
- [Getting Started with Policies](#)

Service plans are collections of *services*, which are, in turn, collections of *policies*. Service plans and services are containers for policies, which include all of the settings and application rules for the level of service you provide to each of your customers. You can create services containing the policies you require, and then group those services into a service plan.

**BARRACUDA**

**RMM**

**TUTORIAL**

How to use Policies, Services, and Service Plans



# BARRACUDA

## RMM

### TUTORIAL

How to use Policies, Services, and Service Plans



Videolink:

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

## Policies and Services

Services and policies are defined as:

### Service

A collection of policies that together provide a specific service for your customer. For example, you may have a *Windows Server* service that provides patch management, monitoring, reporting, and maintenance tasks for Windows Servers.

### Policy

A collection of settings and automatic application rules that perform an action, such as baseline monitoring for Windows workstations, or critical and security patching for servers. The following are the policy types: monitoring, automation, patching, reporting, **Support Assistant**, **Avast Antivirus**, **Intronis Backup**, **Microsoft Defender AV**, **Advanced Software Management**, and **Barracuda Content Shield**. Barracuda RMM includes default policies for each policy type.

If you choose to create a service plan or modify an existing one, you should first understand each policy type in Barracuda RMM. The following table lists the six types of policies available, with a description and example of each.

Policy Type	Description	Example
<b>Automation</b>	A script or script package that runs an automated task.	The <b>Microsoft Exchange Server Maintenance</b> policy reports on server database stats and health, determines if any messages are stuck queueing, and provides a warning if an SSL is due to expire or has expired.
<b>Avast Antivirus</b>	A group of settings that determine which aspects of <b>Avast Antivirus</b> are enabled.	The <b>Server AV Policy</b> prevents automatic updates and reboots on servers and includes automatic application rules to deploy the policy to both member and standalone servers.
<b>Content Shield</b>	A group of settings that alerts you when Barracuda Content Shield thresholds are met.	
<b>Intronis Backup</b>	A group of settings that determines how Intronis backups are performed and what is included. You can also add alerts, similar to monitoring policies. Two types of policies are available: File and Folder and Physical Imaging.	The Windows Server Files and Folders policy defines default settings for files and folders backup operations on Windows Servers.
<b>Microsoft Defender AV</b>	A group of settings that defines certain behavior for Microsoft Defender.	The <b>Default Microsoft Defender AV</b> policy defines default settings for virus and threat protection, scans and virus definition updates, and alerts for Microsoft Defender incidents.
<b>Monitoring</b>	A collection of monitors and associated alert rules for a specific application, operating system, or hardware device.	The <b>Microsoft Windows Servers (Enhanced)</b> policy provides core Windows server monitoring on <b>Windows Update</b> , service failures, disk failures, file system failures, network failures, and event log issues.
<b>Advanced Software Management</b>	A group of patch management settings for third party applications, including scan frequency, execution schedule options, and the approval groups to which the patching policy will be assigned.	The <b>Default Advanced Software Management</b> policy downloads and installs third party application patches that have been approved.

<b>Patching</b>	A group of patch management settings, including detection frequency, automatic update options, and the approval groups to which the patching policy will be assigned.	The <b>Microsoft Windows Server Patching</b> policy downloads and installs all Windows Server critical and security patches.
<b>Reporting</b>	A collection of reports (both default and custom), the schedule on which the reports will run, and email and formatting options.	The <b>Monthly Report</b> policy includes a list of common reports, such as <b>Executive Summary</b> and <b>Work Completed Summary</b> , as well as a report execution schedule and recipient information.
<b>Support Assistant</b>	A collection of <b>Support Assistant</b> customizations, including the context menu items, branded messages, notification area icons.	The <b>Microsoft Windows Workstation Tray Profile</b> policy deploys and configures the <b>Support Assistant Tray Profile</b> to each Windows desktop and laptop.

Previous to Barracuda RMM 10.0, *monitoring policies* were called *policy modules*.

## Getting Started with Policies

You can browse the policies available in Barracuda RMM to gain an understanding as to what is currently available. You can modify these policies by copying them and modifying the copy, or you can create policies that reflect your unique service offerings.

The following table provides more help for creating each policy type:

<b>For more information about viewing, modifying, and creating:</b>	<b>go to:</b>	<b>or click:</b>
Automation policies	<b>Service Delivery &gt; Policies &gt; Automation</b>	<a href="#">About Creating Automation Policies</a>
<b>Avast Antivirus</b> policies	<b>Service Delivery &gt; Policies &gt; Avast Antivirus</b>	<a href="#">Setting Up Antivirus Policies</a>
Barracuda Content Shield policies	<b>Service Delivery &gt; Policies &gt; Content Shield</b>	<a href="#">Working with Barracuda Content Shield Policies</a>
Microsoft Defender AV policies	<b>Service Delivery &gt; Policies &gt; Microsoft Defender AV</b>	<a href="#">Setting Up Microsoft Defender Antivirus Policies</a>

Intronis Backup policies	<b>Service Delivery &gt; Policies &gt; Intronis Backup &gt; Files and Folders</b> <b>Service Delivery &gt; Policies &gt; Intronis Backup &gt; Physical Imaging Standard</b>	<a href="#">Working with Intronis Backup Policies</a>
Monitoring policies	<b>Service Delivery &gt; Policies &gt; Monitoring</b>	<a href="#">Monitoring Policies</a>
Patching policies	<b>Service Delivery &gt; Policies &gt; Patching</b>	<a href="#">Setting Up Microsoft Patch Management in Barracuda RMM</a>
<b>Support Assistant</b> policies	<b>Service Delivery &gt; Policies &gt; Support Assistant</b>	<a href="#">Creating a Support Assistant Policy</a>

For more information about reporting policies, go to **Service Delivery > Policies > Reporting** , or see [Creating Report Policies](#) .

## Figures

© Barracuda Networks Inc., 2024 The information contained within this document is confidential and proprietary to Barracuda Networks Inc. No portion of this document may be copied, distributed, publicized or used for other than internal documentary purposes without the written consent of an official representative of Barracuda Networks Inc. All specifications are subject to change without notice. Barracuda Networks Inc. assumes no responsibility for any inaccuracies in this document. Barracuda Networks Inc. reserves the right to change, modify, transfer, or otherwise revise this publication without notice.