

# Tanium™ Engage User Guide

Autonomous IT. Unstoppable Business.

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# Engage overview

With Engage, you can create surveys to collect qualitative feedback from endpoint users, send notifications to targeted endpoints managed using Tanium™ Client, and deploy remediations to these endpoints to correct problems.

## Surveys

A survey in Engage is a set of up to five questions that you want to send to a defined set of endpoints. Surveys are sent to all users of an endpoint and appear on the endpoint as a Tanium end-user notification. If the user postpones the survey, they can reopen the survey in the self-service portal.

The questions in a survey can be unique to that survey, or you can copy questions from template questions that you can create.

### Answer types

**Multiple choice**: A question that provides up to 10 answers from which the user can select one answer.

**Sentiment**: A question that collects data about the user's feelings. The user responses to sentiment questions contribute to the employee sentiment score.

The sentiment score is calculated on a 1-5 Likert scale rating about the user's feelings (5: Strong Positive, 1: Strong Negative). The overall sentiment score is a scaled average of all sentiment score questions across all surveys that have sentiment questions, and gets a rating based on the following calculations:

- Strong Positive: 87.5-100
- Positive: 62.5-87.4
- Neutral: 37.5-62.4
- Negative: 12.5-37.4
- Strong Negative: 0-12.4

## Notifications

A notification in Engage is information that only requires acknowledgment that you want to send to a defined set of endpoints. Notifications are sent to all users of an endpoint and appear on the endpoint as a Tanium™ End-User Notifications notification message. Use notifications to notify employees of operational and service issues; send notifications to retrieve IT-related details from employees and avoid excess service tickets. You can also send notifications to communicate announcements about training, policy updates, and organizational changes.

## Targeting

To configure which endpoints receive a survey or notification, you must configure targeting.

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The targeting for a survey or notification is a computer group, which is a set of endpoints that you want to manage together. You might have existing computer groups to target surveys or notifications, or you might want to create new computer groups. The user that creates the survey or notification must have management rights to this computer group. For more information about assigning computer groups to a user, see Tanium Platform User Guide: Manage computer group assignments for a user.

For each survey or notification, you can optionally configure trigger conditions that define sensor or metric thresholds that must be met to show the survey or notification on a targeted endpoint. When you publish a survey, the survey runs in the background on each targeted endpoint. However, the end users of the endpoint do not see the survey until the trigger conditions for the survey are met. Similarly, when you schedule a notification, the end users of the endpoint do not see the notification until the trigger conditions for the notification are met. If you do not specify trigger conditions in the survey or notification, the survey or notification appears to end users on all targeted endpoints.

## Remediations

You can configure one remediation per survey or notification. A remediation can open a link or deploy an action to the targeted endpoint.

- For surveys, a remediation is attached to a question answer in the last question of the survey. Multiple choice questions can have a package or link remediation. Sentiment questions can contain only a link remediation.
- For notifications, the remediation action begins when the user clicks a button to acknowledge the notification.

Package remediations are packages that a user can choose to deploy to their endpoint to solve the issue that was found with trigger conditions. For example, the trigger condition might be a missing patch that sends a survey question to the endpoint user. If the user chooses to install the patch, the remediation package is deployed to the endpoint. In another scenario, a user might experience multiple system crashes, and get sent a survey that asks them if they want to open an IT ticket, which opens a URL to their internal support site.

You can choose from the default remediation tasks or create your own tasks. For more information, see Creating remediation tasks on page 38.

### Default remediation tasks

**Restart Endpoint**

Restarts the target device.

**Clear Microsoft Teams Cache**

Clears cache to resolve problems with Microsoft Teams.

**Clear DNS Cache**

Clears DNS cache to help resolve network issues.

**Enable / Disable Fast Start**

Enables or disables the Windows OS Fast Start feature.

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**Restart <application>**

Restarts the (macOS) Apple Safari, Cisco Webex, Google Chrome, Microsoft Edge, Microsoft Outlook, Microsoft Teams, Mozilla Firefox, Slack, or Zoom application.

**User Disk Cleanup**

Performs light (Recycle bin empty) clean.

# Interoperability with other Tanium products

Engage works with other Tanium products.

## Directory Query

Engage uses Tanium™ Directory Query to collect user attributes for survey results. For more information, see Tanium Directory Query.

## End-User Notifications

Engage uses Tanium End-User Notifications to notify users about surveys and notifications. For more information, see Install and configure Tanium End-User Notifications on page 22.

## Endpoint Configuration

Engage uses Tanium™ Endpoint Configuration to deploy remediation tasks to endpoints. For more information, see Install and configure Tanium Endpoint Configuration on page 21.

## Performance

Engage uses Tanium™ Performance for metrics to monitor, measure and improve the performance of end user digital experiences. For more information, see Tanium Performance.

## Reporting

Engage uses Tanium™ Reporting to create the charts on the Engage **Overview** page. For more information, see Tanium Reporting.

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# Engage requirements

Review the requirements before you install and use Engage.

## Core platform dependencies

Make sure that your environment meets the following requirements:

- Tanium license that includes Engage. For more information about how to get Engage, see Tanium Solutions & Bundles.
- Tanium™ Core Platform servers
- Tanium™ Client: Any supported version of Tanium Client. For more information, see Tanium Client Management User Guide: Client version and host system requirements. If you use a Client version that is not listed, certain product features might not be available, or stability issues can occur that can only be resolved by upgrading to one of the listed Client versions.

## Computer group dependencies

When you first sign in to Tanium Console after a fresh installation of Tanium Server, the server automatically imports the `All Windows` and `All Macs` computer groups.

## Solution dependencies

Other Tanium solutions are required for Engage to function (required dependencies) or for specific Engage features to work (feature-specific dependencies). The installation method that you select determines if the Tanium Server automatically imports dependencies or if you must manually import them.




Some Engage dependencies have their own dependencies, which you can see by clicking the links in the lists of Required dependencies on page 12 and Feature-specific dependencies on page 12. Note that the links open the user guides for the latest version of each solution, not necessarily the minimum version that Engage requires.

### Tanium recommended installation

If you select **Tanium Recommended Installation** when you import Engage, the Tanium™ Server automatically imports all your licensed solutions at the same time. For more information, see Tanium Console User Guide: Import all modules and services.

### Import specific solutions

If you select only Engage to import, the Tanium Server automatically imports the latest available versions of any required dependencies that are missing. If some required dependencies are already imported but their versions are earlier than the minimum required for Engage, the server automatically updates those dependencies to the latest available versions.

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### Required dependencies

Engage has the following required dependencies:

- Tanium™ Endpoint Configuration
- Tanium™ Interact
- Tanium™ Data Service (TDS)
- Tanium™ End-User Notifications
- Tanium™ System User Service
- Tanium™ RDB
- Tanium™ Reporting

### Feature-specific dependencies

If you select only Engage to import, you must manually import or update its feature-specific dependencies regardless of Tanium Console or Tanium Core Platform versions. Engage has the following feature-specific dependencies at the specified minimum versions:

- Tanium™ Directory Query to collect user attributes to display in survey results.
- Tanium™ Criticality to collect user attributes to display in survey results.
- Tanium™ Performance to create performance-related surveys and to analyze employee sentiment based on performance scores.

## Client extensions and endpoint tools

Tanium Endpoint Configuration installs Client Extensions and other tools for Engage on endpoints. Client extensions perform tasks that are common to certain Tanium solutions. Each Client Extension and tool might have recommended security exclusions to allow them to run without interference. For more information, see Security exclusions. For a list of Engage tools, see Reference: Engage endpoint tools on page 63. For a list of all Client Extensions and tools, see Tanium Client Management User Guide: Reference: Client extensions used for Tanium solutions.

## Tanium™ Module Server

Engage is installed and runs as a service on the Module Server host computer. The impact on the Module Server is minimal and depends on usage.

For information about Module Server sizing in a Windows deployment, see Tanium Core Platform User Guide for Windows Deployments: Host system sizing guidelines.

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# Endpoints

## Supported operating systems

The following endpoint operating systems are supported with Engage.

**Supported operating systems for Tanium Engage**

| Operating System | Version |
|---|---|
| Microsoft Windows Workstation | • Windows 11<br>• Windows 10 |
| macOS | macOS 11 Big Sur or later |

# Host and network security requirements

Specific ports and processes are needed to run Engage.

## Ports

The following ports are required for Engage communication.

**Port requirements**

| Source | Destination | Port | Protocol | Purpose |
|---|---|---|---|---|
| Module Server | Module Server (loopback) | 17454 | TCP | Internal purposes; not externally accessible |

BEST PRACTICE

Configure firewall policies to open ports for Tanium traffic with TCP-based rules instead of application identity-based rules. For example, on a Palo Alto Networks firewall, configure the rules with service objects or service groups instead of application objects or application groups.

## Security exclusions

If antivirus (AV) or other security software is in use in the environment to monitor and block unknown host system processes, Tanium requires that a security administrator create exclusions to allow the Tanium processes to run without interference. This software can include security applications that are included with an endpoint operating system, such as `fapolicyd` on some Linux distributions, or Microsoft Defender on Windows. The configuration of these exclusions varies depending on the security software. For more information about security exclusions to define across Tanium, see Tanium Client Management Guide: Reference: Endpoint security exclusions and for Windows-based Tanium Core Platform deployments, see Tanium Core Platform User Guide for Windows Deployments: Tanium Core Platform Server security exclusions.

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NOTE

If the required exclusions are not configured, or if Tanium suspects interference from AV or security software, Tanium might require you to remove or disable the AV or security software temporarily for the purposes of troubleshooting and restore it once troubleshooting is complete.

**Engage security exclusions for Tanium Core Platform servers (Windows deployments only)**

| Target Device | Notes | Exclusion Type | Exclusion |
|---|---|---|---|
| Module Server | | Process | <*Module Server*>\services\engage-service\TaniumEngageService.exe |

**Engage security exclusions for endpoints**

| Endpoint OS | Notes | Exclusion Type | Exclusion |
|---|---|---|---|
| Windows | | Folder | <*Tanium Client*>\python312 |
| | | Process | <*Tanium Client*>\python312\TPython.exe |
| | | File | <*Tanium Client*>\TPython\TPython.bat |
| | | Folder | <*Tanium Client*>\TPython312 |
| | | Process | <*Tanium Client*>\TaniumCX.exe |
| | | File | <*Tanium Client*>\extensions\TaniumEndUser.dll |
| | | Folder | <*Parent of Tanium Client directory*>\Tanium End User Notification Tools |
| macOS | | Folder | <*Tanium Client*>/python312 |
| | | Process | <*Tanium Client*>/python312/python |
| | | Process | <*Tanium Client*>/python312/bin/pybin |
| | | Process | <*Tanium Client*>/TPython/TPython |
| | | Folder | <*Tanium Client*>/TPython312 |
| | | Process | <*Tanium Client*>/TaniumCX |
| | | Folder | /Library/Tanium/EndUserNotifications |

IMPORTANT

You must also apply End-User Notifications exclusions for endpoints.

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# User role requirements

Predefined roles grant the following permissions, which are required to use Engage functionality:

- Engage solution permissions on page 15
- Engage administration and platform content permissions on page 16: The solution permissions automatically provide some of these permissions.

To review a summary of the predefined roles, see Set up Engage users on page 22.

Optional roles for Engage on page 17 are required to enable optional Engage functionality.

Some Engage solution permissions provide permissions that are associated with other solutions. Furthermore, all the platform content permissions and some solution permissions apply to content sets that might contain content for other solutions in addition to Engage. If you create custom roles for Engage users, be sure to assign all the solution permissions and content set permissions that are required for Engage functionality. If you are not sure which permissions are required for a custom role, view the permissions of the predefined roles. For more information, see the following sections of the Tanium Console User Guide:

- RBAC overview (provides an overview of roles, permissions, and content sets)
- Provided role permissions
- View effective role permissions
- Configure a custom role




Do not assign the **Engage Service Account** and **Engage Service Account - All Content Sets** roles to users. These roles are for internal purposes only.

**Engage solution permissions**

| Permission | Engage Administrator[1] | Engage Operator[1] | Engage Question Author[1] | Engage Remediation Author[1] | Engage Theme Author[1] | Engage User[1] |
|---|---|---|---|---|---|---|
| **Engage**<br>View the Engage workbench | ✓<br>SHOW | ✓<br>SHOW | ✓<br>SHOW | ✓<br>SHOW | ✓<br>SHOW | ✓<br>SHOW |
| **Engage Questions**<br>Read and write access to Engage survey questions | ✓<br>READ<br>WRITE | ✓<br>READ<br>WRITE | ✓<br>READ<br>WRITE | ✓<br>READ | ✓<br>READ | ✓<br>READ |
| **Engage Remediations**<br>Read and write access to the Engage remediations | ✓<br>READ<br>WRITE | ✓<br>READ<br>WRITE | ✓<br>READ | ✓<br>READ<br>WRITE | ✗ | ✓<br>READ |

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**Engage solution permissions (continued)**

| Permission | Engage Administrator[1] | Engage Operator[1] | Engage Question Author[1] | Engage Remediation Author[1] | Engage Theme Author[1] | Engage User[1] |
|---|---|---|---|---|---|---|
| **Engage Settings**<br>Write access to platform settings in the Engage module | READ | READ<br>WRITE | READ | READ | READ | READ |
| **Engage Surveys**<br>Read and write access to Engage surveys | AUTHOR<br>OVERRIDE<br>READ<br>WRITE | AUTHOR<br>OVERRIDE<br>READ<br>WRITE | READ | READ | READ | AUTHOR<br>READ<br>WRITE |
| **Engage Themes**<br>Read and write access to themes | WRITE | READ<br>WRITE | READ | | READ<br>WRITE | READ |

[1] The permissions for these roles provide solution permissions for other solutions. To view the provided permissions, see Tanium Console User Guide: View effective role permissions.

**Engage administration and platform content permissions**

| Permission | Permission Type | Engage Administrator | Engage Operator | Engage Question Author | Engage Remediation Author | Engage Theme Author | Engage User |
|---|---|---|---|---|---|---|---|
| Action Group | Administration | READ | READ | READ | READ | READ | READ |
| Computer Group | Administration | READ | READ | READ | READ | READ | READ |
| Action | Platform Content | READ | READ | READ | READ | READ | READ |
| Filter Group | Platform Content | READ | READ | READ | READ | READ | READ |
| Package | Platform Content | READ<br>WRITE | READ<br>WRITE | READ | READ<br>WRITE | READ | READ |

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**Engage administration and platform content permissions (continued)**

| Permission | Permission Type | Engage Administrator | Engage Operator | Engage Question Author | Engage Remediation Author | Engage Theme Author | Engage User |
|---|---|---|---|---|---|---|---|
| Plugin | Platform Content | ✓ READ EXECUTE | ✓ READ EXECUTE | ✓ READ EXECUTE | ✓ READ EXECUTE | ✓ READ EXECUTE | ✓ READ EXECUTE |
| Sensor | Platform Content | ✓ READ | ✓ READ | ✓ READ | ✓ READ | ✓ READ | ✓ READ |

To view the content sets to which the platform content permissions apply, see Tanium Console User Guide: View effective role permissions.

**Optional roles for Engage**

| Role | Enables |
|---|---|
| End-User Notifications Endpoint Configuration Operator | Manage most configurations and deployment of End-User Notifications functionality to endpoints. |

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# Getting started with Engage

Follow these steps to configure and use Engage.

## Step 1:  Configure Engage

1. For more information about setting up Engage, see Configuring Engage on page 21.
2. Control access to the platform and products by assigning users to groups and roles. For more information, see Tanium Console User Guide: RBAC overview and Configuring Engage on page 21.

## Step 2: Create and schedule surveys

You can create surveys that include remediations for the end user to help solve problems with their endpoint. You can run and re-run surveys for specific time periods. For more information, see Creating surveys on page 25.

If you include a remediation in your survey, you can create custom remediation tasks in addition to using the default tasks that are provided. For more information, see Creating remediation tasks on page 38.

## Step 3: Create and send notifications

Use notifications to notify employees of operational and service issues. You can also send notifications to communicate announcements about training, policy updates, and organizational changes. You can create and send a notification to targeted endpoints that can optionally include a remediation for the end user to help solve problems with their endpoint. For more information, see Creating notifications on page 53.

## Step 4: Analyze results

After your surveys run, you can look at the results. For more information, see View survey results on page 30 and Understanding employee sentiment on page 35.

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# Installing Engage

Use Tanium Console **Solutions** page to install Engage and choose either automatic or manual configuration:

- **Automatic configuration with default settings**: Engage is installed with any required dependencies and other selected products. After installation, the Tanium Server automatically configures the recommended default settings. This option is the best practice for most deployments. For more information about the automatic configuration for Engage, see Import Engage with default settings on page 19.
- **Manual configuration with custom settings**: After installing Engage, you must manually configure required settings. Select this option only if Engage requires settings that differ from the recommended default settings. For more information, see Import Engage with custom settings on page 20.

## Before you begin

- Read the release notes.
- Review the Engage requirements on page 11.
- Assign the correct roles to users for Engage. Review the User role requirements on page 15.
    - To import the Engage solution, you must be assigned the Administrator reserved role.
    - To configure the Engage action group, you must be assigned the Administrator reserved role, Content Administrator reserved role, or a role that has the **Action Group write** permission.

## Import Engage with default settings

You can set the Engage action group to target the **No Computers** filter group by enabling restricted targeting before importing Engage. This option enables you to control tools deployment through scheduled actions that are created during the import and that target the Tanium Engage action group. For example, you might want to test tools on a subset of endpoints before deploying the tools to all endpoints. In this case, you can manually deploy the tools to an action group that you configured to target only the subset. To configure an action group, see Tanium Console User Guide: Managing action groups. To enable or disable restricted targeting, see Tanium Console User Guide: Tools deployment and restricted targeting.

When you import Engage with automatic configuration, the following default settings are configured:

**Default settings**

| Setting | Default value |
| --- | --- |
| Action group | • Restricted targeting disabled (default): `All Computers` computer group<br>• Restricted targeting enabled: `No Computers` computer group |

To import Engage and configure default settings, see Tanium Console User Guide: Import all modules and services. After the import, verify that the correct version is installed. For more information, see Verify Engage version on page 20.

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## Import Engage with custom settings

To import Engage without automatically configuring default settings, be sure to clear the **Apply All Tanium recommended configurations** checkbox while performing the steps in Tanium Console User Guide: Import or update specific solutions. After the import, verify that the correct version is installed. For more information, see Verify Engage version on page 20.

To organize computer groups, see Organize computer groups on page 22.

To configure the Engage action group, see Configure the Engage action group on page 22.

## Manage solution dependencies

Other Tanium solutions are required for Engage to function (required dependencies) or for specific Engage features to work (feature-specific dependencies). For more information, see Solution dependencies on page 11.

## Upgrade Engage

For more information about the steps to upgrade Engage, see Tanium Console User Guide: Managing Tanium solutions. After the upgrade, verify that the correct version is installed: see Verify Engage version on page 20.

## Verify Engage version

After you import or upgrade Engage, verify that the correct version is installed:

1. Refresh your browser.
2. From the Main menu, go to **Modules > Engage** to open the Engage **Overview** page.
3. To show version information, click Info .

## Troubleshoot issues

If you experience issues with installing Engage, see Troubleshooting Engage on page 61.

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# Configuring Engage

If you did not install Engage with the **Apply All Tanium recommended configurations** option, you must enable and configure certain features.

## Install and configure Tanium Endpoint Configuration

### Manage solution configurations with Tanium Endpoint Configuration

Tanium Endpoint Configuration delivers configuration information and required tools for Tanium Solutions to endpoints. Endpoint Configuration consolidates the configuration actions that traditionally accompany additional Tanium functionality and eliminates the potential for timing errors that occur between when a solution configuration is made and the time that configuration reaches an endpoint. Managing configuration in this way greatly reduces the time to install, configure, and use Tanium functionality, and improves the flexibility to target specific configurations to groups of endpoints.




For information about how to install Endpoint Configuration, see Tanium Endpoint Configuration User Guide: Installing Endpoint Configuration.

Optionally, you can use Endpoint Configuration to require approval of configuration changes. When configuration approvals are enabled, Endpoint Configuration does not deploy a configuration change to endpoints until a user with approval permission approves the change. For information about the roles and permissions that are required to approve configuration changes for Engage, see User role requirements on page 15. For more information about how to enable and use configuration approvals in Endpoint Configuration, see Tanium Endpoint Configuration User Guide: Managing approvals.




For solutions to perform configuration changes or tool deployment through Endpoint Configuration on endpoints with action locks turned on, you must enable the **Manifest Package Ignore Action Lock** and **Deploy Client Configuration and Support Package Ignore Action Lock** settings. To access these settings, from the Endpoint Configuration **Overview** page, click Settings and select **Global**. For more information about action locks, see Tanium Console User Guide: Managing action locks.

For more information about Endpoint Configuration, see Tanium Endpoint Configuration User Guide.

If you enabled configuration approvals, the following configuration changes must be approved in Endpoint Configuration before they deploy to endpoints:

- Creating, updating, or deleting surveys and notifications

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# Install and configure Tanium End-User Notifications

Tanium End-User Notifications is a shared service that is used to send notifications to users, including sending Engage surveys and notifications. You must configure end-user notifications and customize the End-User Self Service interface before you configure Engage. For more information, see Tanium End-User Notifications User Guide: Configuring and Tanium End-User Notifications User Guide: Customizing the End-User Self Service interface. Configure any exclusions that are listed in the Tanium End-User Notifications User Guide: Security Exclusions. You can customize the self-service interface to match your corporate branding.

# Configure Engage

## Configure the Engage action group

Importing the Engage module automatically creates an action group to target specific endpoints. If you did not use automatic configuration or you enabled restricted targeting when you imported Engage, the action group targets **No Computers**.

If you used automatic configuration and restricted targeting was disabled when you imported Engage, configuring the Engage action group is optional.

Select the computer groups to include in the Engage action group.




Clear the selection for **No Computers** and make sure that all operating systems that are supported by Engage are included in the Engage action group.

1. From the Main menu, go to **Administration > Actions > Action Groups**.
2. Click **Tanium Engage**.
3. Select the computer groups that you want to include in the action group and click **Save**.
   If you select multiple computer groups, choose an operator (AND or OR) to combine the groups.

## Organize computer groups

1. Determine which endpoints receive endpoints with computer group targeting. Create relevant computer groups to organize your endpoints. Some options include:
   - Endpoint type, employee workstations
   - Endpoint location, such as by country or time zone
2. Add the computer groups to the appropriate users or user groups so that the survey and notification creators can schedule surveys and notifications to run on those endpoints.

For more information, see Tanium Core Platform User Guide: Managing computer groups.

## Set up Engage users

You can use the following set of predefined user roles to set up Engage users.

For more information about permissions for each role, see User role requirements on page 15.

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IMPORTANT

On installation, Engage creates an **Engage** user to automatically manage the Engage service account. Do not edit or delete the **Engage** user.

For more information about assigning user roles, see Tanium Core Platform User Guide: Manage role assignments for a user.

**Engage Administrator**

Assign the **Engage Administrator** role to users who manage the configuration and deployment of Engage functionality to endpoints.
This role can perform the following tasks:

- Configure Engage service settings.
- View and modify Engage surveys, survey question, notifications, and remediations.
- View and modify themes.
- Dismiss or reject approvals for Engage tasks in Tanium Endpoint Configuration.

**Engage Operator**

Assign the **Engage Operator** role to users who manage the configuration and deployment of Engage functionality to endpoints.
This role can perform the following tasks:

- Configure Engage service settings.
- View and modify Engage surveys, survey questions, notifications, and remediations.
- View and modify themes.
- Dismiss or reject approvals for Engage tasks in Tanium Endpoint Configuration.

**Engage Question Author**

Assign the **Engage Question Author** role to users who need to create surveys and survey question templates.
This role can perform the following tasks:

- View Engage workbench, settings, remediations, surveys, and notifications.
- View themes
- Author and edit Engage questions.

**Engage Remediation Author**

Assign the **Engage Remediation Author** role to users who need to create remediations for surveys, notifications, and survey question templates.
This role can perform the following tasks:

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- View Engage workbench, settings, surveys, survey questions, and notifications.
- Author and edit Engage remediations.

**Engage User**

Assign the **Engage User** role to users who need visibility into Engage data and the ability to create surveys. This role can perform the following tasks:

- View and modify Engage surveys.
- View survey questions, remediations, and notifications.
- View settings.

**Engage Theme Author**

Assign the **Engage Theme Author** role to users who need to create themes. This role can perform the following tasks:

- View surveys, survey questions, remediations, and notifications.
- View and create themes.




Do not assign the **Engage Service Account** and **Engage Service Account - All Content Sets** roles to users. These roles are for internal purposes only.

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# Creating surveys

A survey can contain up to five questions. You can send surveys to targeted groups of users, based on endpoint trigger conditions. If you define trigger conditions for a survey, you can also include remediations in the last survey question.

When the endpoint meets the conditions for a survey, the survey displays to the endpoint user as a notification. If the user postpones the survey, they can later access the survey in the End-User Self Service Interface. For more information, see Tanium End-User Notifications User Guide: Customizing the End-User Self Service interface.




For endpoints that have multiple users, notifications appear for every user as long as the trigger conditions are true.

For more information about example scenarios, see Survey examples.

## Create survey

1. From the Main menu, go to **Modules > Engage > Surveys**.
2. Click **Create Survey** and then select an option from the list.
   - **Blank Survey**: Start with a blank form and complete the fields to build a new survey.
   - **From Template**: Load a survey template that includes predefined trigger conditions, survey questions, and remediation tasks. You can refine the survey properties to suit your needs.

     The following templates are available by default:

     **Survey templates**

| Template name | Use case | Remediation task |
|---|---|---|
| Browser Security - Chrome | Target endpoints with pending updates for Google Chrome. | Task: Restart Google Chrome |
| Browser Performance - Chrome[1] | Suggest users to restart Chrome to improve browser performance. | Task: Restart Google Chrome |
| Device Performance | Collect and measure employee sentiment about system performance. | None |

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**Survey templates (continued)**

| Template name | Use case | Remediation task |
|---|---|---|
| IT Policy | Confirm your employees have read and understood your organization's IT policy. | Link: *<Add a related link to your company site>* |
| Low Disk Space | Target endpoints with low disk space to maintain optimal system performance and prevent future issues. For example, endpoints with less than 5 GB on the C drive often cannot update the operating system, which can create security risks. | Task: User Disk Cleanup |
| Reboot Suggested | Suggest a reboot for endpoints that have not restarted within the last 7 days. | Task: Restart Endpoint |
| Recent Software Upgrades | Collection and measure employee sentiment after recent software upgrades. | None |
| Workstation Performance[1] | Measure employee sentiment regarding performance on devices with low performance scores. | None |

[1]Requires the Tanium Performance solution.

3. Give the survey a title, optional description, and select an original language. The title appears to the user in the notification on the endpoint.
4. (Optional) Define trigger conditions. A trigger condition defines when the end user of the endpoint gets prompted to take the survey. The trigger condition can be based on a Tanium sensor or performance metric. If you do not define trigger conditions, the survey is sent to end users on all targeted endpoints; you define targets when you schedule the survey.
    a. Click **Add Condition**, then click **+ Row** or **+ Group** to define the trigger condition.
    b. Click **Apply** ☑ to save the condition, then click **Save**.
    c. In **Minimum time between survey notifications**, specify the amount of time between survey notifications that the user receives on the endpoint. By default, the survey notification is every 24 hours.

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TIP

To prevent an endpoint from being prompted again after a user responds to a survey, you can choose either of the following options:

- Set the **Minimum time between survey notifications** to a duration longer than you plan to run the survey.
- Add the **Engage - Survey Results** sensor to the trigger condition for **Survey Name does not contain** your survey name. This option works only at an endpoint level, not a user level. If there are multiple users on an endpoint, the first user response causes the sensor to be populated, so the other users not get the survey.

5. Click **Add Survey Questions**. You can either create a new question or select an existing question template. If you create a new question while you are creating the survey, you can add the question to this survey only, or save the question as a template. For more information about managing question templates, see Create question templates on page 32.
6. If you are creating a question, you can add the question details, and text.
7. Create answers to the question. Choose between multiple choice or sentiment score answer types:

   **Multiple choice**: A question that provides up to 10 answers from which the user can select one answer.

   **Sentiment**: A question that collects data about the user's feelings. The user responses to sentiment questions contribute to the employee sentiment score.

   The sentiment score is calculated on a 1-5 Likert scale rating about the user's feelings (5: Strong Positive, 1: Strong Negative). The overall sentiment score is a scaled average of all sentiment score questions across all surveys that have sentiment questions, and gets a rating based on the following calculations:

   - Strong Positive: 87.5-100
   - Positive: 62.5-87.4
   - Neutral: 37.5-62.4
   - Negative: 12.5-37.4
   - Strong Negative: 0-12.4

8. Add remediations. A multiple choice answer can have up to ten multiple choice answers and a link or task remediation. A sentiment answer can have a link remediation.

IMPORTANT

You can include remediations only in the last question of a survey.

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- A link that opens a link for the user, for example, to open a ticket with the IT help desk. The link must start with `https://`.
- A task to deploy to the endpoint when the associated response is selected. You can choose from the following pre-defined tasks:

  **Restart Endpoint**

  Restarts the target device.

  **Clear Microsoft Teams Cache**

  Clears cache to resolve problems with Microsoft Teams.

  **Clear DNS Cache**

  Clears DNS cache to help resolve network issues.

  **Enable / Disable Fast Start**

  Enables or disables the Windows OS Fast Start feature.

  **Restart <application>**

  Restarts the (macOS) Apple Safari, Cisco Webex, Google Chrome, Microsoft Edge, Microsoft Outlook, Microsoft Teams, Mozilla Firefox, Slack, or Zoom application.

  **User Disk Cleanup**

  Performs light (Recycle bin empty) clean.




You can also create custom remediation tasks from another Tanium package. For more information, see Creating remediation tasks on page 38.

9. (Optional) Add multi-language support. Click **Add Languages**, select one or more languages, expand each language you selected, and enter the translated text. The default survey language is based on the locale and OS of the user.




The **Add Languages** option is disabled until you add a survey title and unique questions. If you include a question with a remediation, you must also specify trigger conditions to enable the **Add Languages** options.

10. Save the survey. You can either save the survey as a draft or save and schedule the survey to run. To save the survey as a draft, it must have at least a title and one survey question.

## Schedule survey run

When you create a survey, it is in draft mode until you schedule it to run. When a survey is running, the survey is collecting feedback from the targeted endpoints.

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1. From the Main menu, go to **Modules > Engage > Surveys**.
2. Click the name of the survey that you want to schedule.
    - If the survey has a **Draft** status, the **Edit survey page** appears and you can edit the schedule.
    - If the survey has a **Done** status, click **Run survey again** to edit the schedule.
    - If the survey has a **Scheduled** or **Running** status, click **End Current Run** and then **Run survey again** to edit the schedule.
3. Set a **Start Time** and **End Time**. The **End Time** includes the following options:
    - **Scheduled**: Set a date and time for the survey to stop running.
    - **None**: Do not set an end time and let the survey run indefinitely.
      You can also choose to use UTC (default) or the endpoint local time to schedule the survey.
4. Choose endpoints to target with the survey. You can select computer groups to receive the survey. The user that creates the survey or notification must have management rights to this computer group. For more information about assigning computer groups to a user, see Tanium Platform User Guide: Manage computer group assignments for a user.
5. Choose user options for the survey, including whether they can postpone or decline the survey. You can also enable anonymous responses to the survey, so no user information is recorded from the responses.
6. Click **Run Survey**. If you want to end a survey while it is running, click **End Current Run**.

## View existing survey status

You can view the latest surveys on the Engage **Overview** page. To view all surveys, from the Engage menu, go to **Surveys**.

**Survey status icons**

| Status | Description |
|---|---|
|  | The survey is in draft mode. Finish editing and schedule the survey run. |
|  | The survey is currently running and collecting feedback from targeted endpoints. |
|  | The survey is scheduled to run at a future date and time. |
|  | The survey is done. You can run the survey again by editing the schedule. |
|  | An error occurred when scheduling or sending the survey. |

## End user survey experience

While the survey is running, all targeted endpoints receive the survey. The end user receives the survey as a notification on their endpoint. The user can take one of the following actions:

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- Take the survey.
- Postpone the survey, if the **Allow user to postpone survey** setting is enabled. The end user gets notified about the survey again at the scheduled interval.
- Decline the survey, if the **Allow user to decline survey** setting is enabled. The user is not notified about the survey again.
- Close the window or shut down the endpoint. The notification is not shown again. The end user must view the survey in the End-User Self Service Interface.
- Take no action. The notification stays on the screen.
- View the survey in the End-User Self Service Interface. The survey is listed in this interface, even if the user declined or postponed the survey.

## View survey results

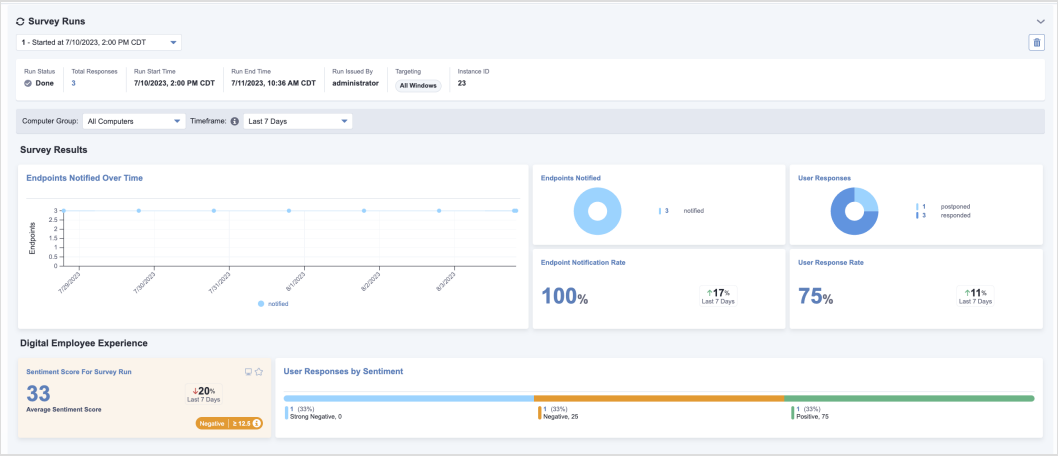
1. From the Engage home page or the **Surveys** page, click the name of the survey that you want to view.
2. If you want to change the results to a previous run, select a run from **Survey Runs**.

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3. The **Survey Results** section shows a summary of the endpoints that received the survey and the users that responded to the survey. The following survey results are available:

**Survey results**

| Result | Description |
|---|---|
| not notified | The survey is not started, waiting for trigger condition to evaluate `true`, or waiting to notify the user. |
| notified | The user was notified. After notification, the survey will show `no response` until the user acknowledges the notification or submits a response. |
| responded | The user responded to a survey. |
| acknowledged | The user acknowledged a push notification. |
| postponed | The user postponed a survey. |
| dismissed | The user dismissed a survey. |
| no response | The survey ended with no response from the user, or the user did not yet interact with an active survey or notification. |




4. View details about survey responses from users in the **Responses** section.
5. To view the survey questions, expand the **Survey Questions** section.

## View survey responses for a single endpoint

You can view survey results for a single endpoint through the Endpoint Details page in Tanium™ Reporting. To view survey results, you must have **Engage Surveys read** permission.

1. Open the Endpoint Details page for the endpoint that requires survey details. For more information, see Tanium Reporting User Guide: View endpoint details.
2. Select the **Engage** tab.

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3. In the **Survey Responses** section, view survey results, responses, performance score, sentiment score, and so on.

## Run survey again

You can re-run a survey that is in the Done state. You can change the schedule, options, and endpoints that are targeted with survey. If you want to change any survey questions, you must create a new survey.

1. From the Main menu, go to **Modules > Engage > Surveys**.
2. Click the name of the survey that you want to run again.
3. Click **Run Survey Again**.
4. Set a **Start Time** and **End Time**. The **End Time** includes the following options:
    - **Scheduled**: Set a date and time for the survey to stop running.
    - **None**: Do not set an end time and let the survey run indefinitely.
      You can also choose to use UTC (default) or the endpoint local time to schedule the survey.
5. Choose endpoints to target with the survey. You can select computer groups to receive the survey. For more information about configuring computer groups for Engage, see Organize computer groups on page 22.
6. Choose user options for the survey, including whether they can postpone or decline the survey.
7. Click **Run Survey**. If you want to end a survey while it is running, click **End Current Run**.

## Create question templates

To create questions that you can reuse in multiple surveys, create survey question templates.

1. From the Main menu, go to **Modules > Engage > Survey Question Templates**.
2. Click **Create Question Template**.
3. Add the question details, text, choices and a remediation for one of the answers. The remediation can provide a URL to open when the associated response is selected.
4. (Optional) Add multi-language support. Click **Add Languages**, select one or more languages, expand each language you selected, and enter the translated text.

    The **Add Languages** option is disabled until you enter the question text, unique answers, and select any remediations.
5. When finished with the question template, click **Submit**.
6. You can add the question to a survey when you add questions. During the survey creation process, click **Add Survey Questions > Choose Existing**.

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IMPORTANT

After you add a question based on a survey template to a survey, you can no longer edit the question in the survey by editing the survey question template.

## Export and import surveys

You can export surveys from one environment and import them to another environment. For example, export surveys from a test environment and import them to a production environment.

NOTE

Surveys with custom remediations cannot be exported.

### Export survey

1. From the Main menu, go to **Modules > Engage > Surveys**.
2. To export all surveys, click **Export All**.

   TIP

   To export a subset of surveys, select one or more surveys and then click **Export**. You can also export an individual survey by clicking **Export** in the View Details panel.

A JSON file downloads to the browser download folder.

### Import survey

1. From the Main menu, go to **Modules > Engage > Surveys**.
2. To import previously exported surveys, click **Import** and then provide the previously downloaded JSON file.

If you import a survey that has the same name as an existing survey, Engage appends **[<#>]** to the name of the imported survey. For example, if ***Survey_Name*** already exists, then Engage imports it as ***Survey_Name [1]***.

## Clone survey

Clone an existing survey to create similar surveys or to run a survey again. You can clone surveys that are in the **Running** or **Done** state.

1. From the Main menu, go to **Modules > Engage > Surveys**.
2. Select the survey that you want to clone by using one of the following methods:
   - Click the name of the survey. The **Survey Details** page appears.
   - Select the checkbox for the survey. The Clone icon appears in the **Surveys** grid header.

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3. Click Clone  and then edit the survey details.

4. Save the survey. You can either click **Save as Draft** or **Save and Schedule Run**.

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# Understanding employee sentiment

To understand employee sentiment, analyze the digital employee experience (DEX) data, which is derived from sentiment scores and performance scores.




This topic includes information about performance scores. Performance scores require the Tanium Performance solution.

## Overall employee sentiment score

Employee sentiment is collected from sentiment questions in surveys.

The sentiment score is calculated on a 1-5 Likert scale rating about the user's feelings (5: Strong Positive, 1: Strong Negative). The overall sentiment score is a scaled average of all sentiment score questions across all surveys that have sentiment questions, and gets a rating based on the following calculations:

- Strong Positive: 87.5-100
- Positive: 62.5-87.4
- Neutral: 37.5-62.4
- Negative: 12.5-37.4
- Strong Negative: 0-12.4

To start getting employee sentiment information, create surveys that include sentiment questions. For more information, see Creating surveys on page 25.

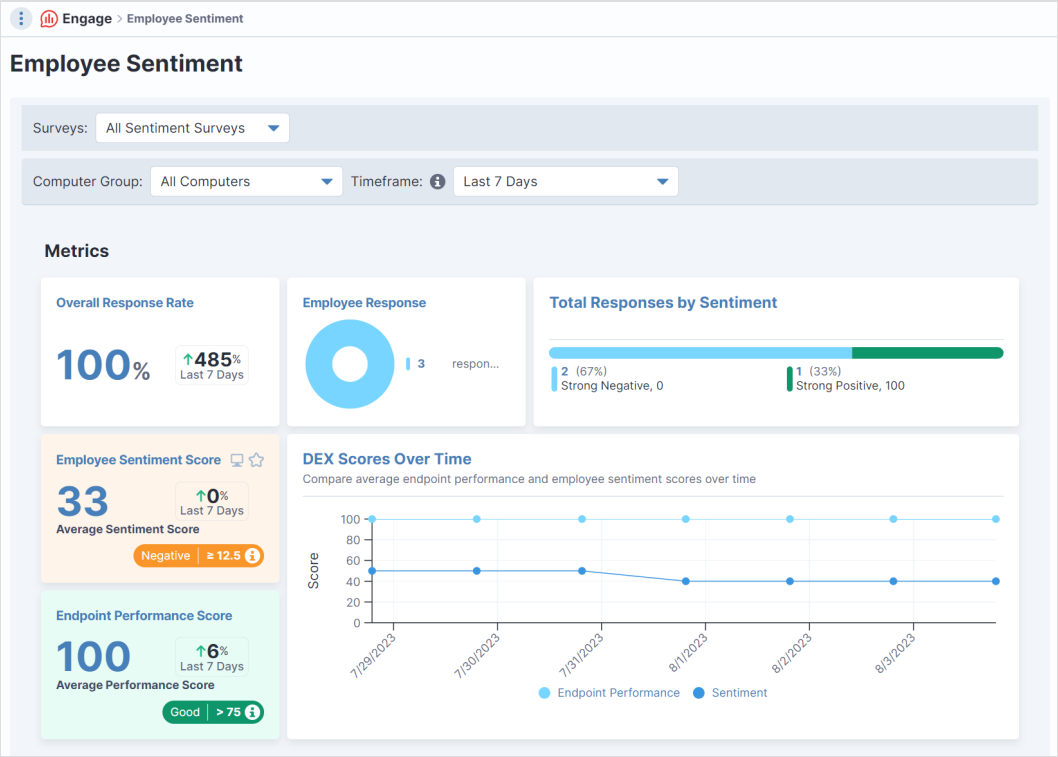
## Scope performance and sentiment scores

You can view the sentiment and performance across all surveys, or for a specific survey, computer group, or time frame.

1. From the Engage menu, go to **Employee Sentiment**. Without any scoping, the data includes performance score data for all endpoints, and all surveys that include a sentiment question.
2. Scope results for a survey. From **Surveys**, select a survey.
3. Scope results for computer groups. The `All Computers` computer group is selected by default. From **Computer Group**, select a computer group.
4. Scope results by date. From **Timeframe**, select a date. To choose specific dates, select **Custom**.

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# Review metric summary




## Overall Response Rate

The overall response rate is the percentage of endpoints that had a user complete surveys that were pushed to that endpoint. If the user dismissed, did not respond, or postponed the survey, the response is considered incomplete.

## Employee Response

The employee response chart shows the count of responses from the surveys that got pushed to the endpoints. The responses can be: no response, dismissed, postponed, or responded.

## Total Responses by Sentiment

Number of responses for each sentiment on the Likert scale (5: Strong Positive, 1: Strong Negative).

## Employee Sentiment Score

The employee sentiment score shows an average sentiment of all sentiment-based survey questions that are scoped in the selection.

## Endpoint Performance Score

The average performance score shows the overall health of all endpoints that are scoped in the selection. For more information about how performance scores get calculated, see Tanium Performance Overview: Performance scores.

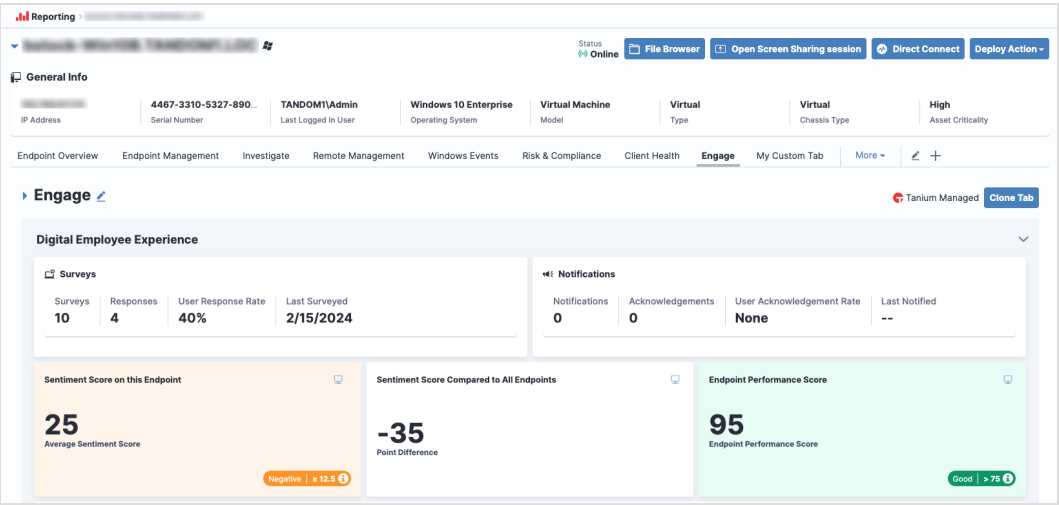
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### DEX Scores Over Time

The DEX Scores Over Time chart shows a line graph, so that you can compare endpoint performance to employee sentiment scores.

## View digital employee experience (DEX) on a single endpoint

You can view DEX details for a single endpoint through the Endpoint Details page in Tanium™ Reporting. To view survey results, you must have **Engage Surveys read** permission.




1. Open the Endpoint Details page for the endpoint that requires survey details. From the **Employee Sentiment** page, you can click a **Computer Name** to get to the details for that endpoint. For more information about how to get to single endpoint views, see Tanium Reporting User Guide: View endpoint details.
2. Select the **Engage** tab.
3. In the **Digital Employee Experience** section, view how many survey notifications and responses were on the endpoint, sentiment score, performance score, and so on.

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# Creating remediation tasks

You can include remediations when you create surveys and notifications. When you create a survey, one question can include a remediation task that the endpoint user can choose to run to resolve an issue. When you create a notification, you can include a remediation that triggers when users acknowledge the notification. In addition to the default remediation packages that are included with Engage, you can define your own custom remediation tasks that use existing Tanium packages, or packages that you define.

## Default remediation tasks

The following remediation tasks are included with Engage.

**Restart Endpoint**

Restarts the target device.

**Clear Microsoft Teams Cache**

Clears cache to resolve problems with Microsoft Teams.

**Clear DNS Cache**

Clears DNS cache to help resolve network issues.

**Enable / Disable Fast Start**

Enables or disables the Windows OS Fast Start feature.

**Restart <application>**

Restarts the (macOS) Apple Safari, Cisco Webex, Google Chrome, Microsoft Edge, Microsoft Outlook, Microsoft Teams, Mozilla Firefox, Slack, or Zoom application.

**User Disk Cleanup**

Performs light (Recycle bin empty) clean.

## Create remediation package

Before you create a remediation task, choose or create a package that you want to deploy as a part of the remediation task.

### Tanium packages

To browse the packages that are already in your environment, go to **Administration > Packages**.

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IMPORTANT

You cannot use sensor-sourced packages as a remediation task. Sensor-sourced packages include a sensor name with pipe characters in the package command, for example: `||Reveal - Confirmed Files_File||`

### Custom package

To create a custom package that runs as user, see the following samples:

- Sample: (Windows with PowerShell Script and Notepad) Create remediation package that runs as user on page 39
- Sample: (Windows with PowerShell Script) Create remediation package that runs as user on page 43
- Sample: (macOS with Shell Script and TXT File) Create remediation package that runs as user on page 46
- Sample: (macOS with Shell Script) Create remediation package that runs as user on page 48

For more information about creating and managing packages, see Tanium Console User Guide: Managing packages.

## Create remediation task

1. From the Main menu, go to **Modules > Engage > Remediations**.
2. Click **Create Task**.
3. Enter a name, description, and content set to which you want to save the remediation task.
4. Click **Add Package** and choose a package to run.
5. Save your changes.

## Sample: (Windows with PowerShell Script and Notepad) Create remediation package that runs as user

Use this sample to create a task that runs as the user answering the survey on a Windows endpoint. This script uses the `TaniumRunAsUser.exe` utility that ships with the Engage tools.

1. This sample includes a script that opens Notepad in the user context on the endpoint. Create the `OpenNotepadAsUser.ps1` file by copying and pasting the following code into a text file.

   OpenNotePadAsUser.ps1

   OpenNotePadAsUser.ps1

```
param (
    # The SID of the user
```

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```
    [Parameter(Position = 0, Mandatory = $true)]
    [string]$UserSID
)

$UserSID = [system.uri]::UnescapeDataString( $UserSID )

function Get-SessionFromSid( [string] $UserSID) {
    # Assume that the user has explorer.exe running
    foreach ( $process in (Get-CimInstance Win32_Process -filter "name = 'explorer.exe'")) {
        $owners = (Invoke-CimMethod -InputObject $process -MethodName GetOwnerSid)
        foreach ($owner in (Where-Object -InputObject $owners -Property ReturnValue -EQ 0)) {
            if ($UserSID -eq $owner.SID) {
                return $process.SessionId
            }
        }
    }
}

# you should check that this is not $null and exit gracefully
$sessionId = Get-SessionFromSid $UserSID
if ($sessionId -eq $null) {
    Write-Error "Could not find session for user SID: $UserSID"
    exit 1
}

# Take note of the extra quotes around the inner command
$command = "cmd.exe /d /c start ""C:\Windows\notepad.exe"""

# Note: /sessionid=<value> is one group
#       /cmd is one group, and has more quotes around $command
#       /userenv ensures that we will load the user's environment variables
```

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```
$arguments = ("/noconsole", "/wrap", "/userenv", "/sessionid=$sessionId", "/cmd
""$command""")


$fileName = "$Env:TANIUM_CLIENT_ROOT\Tools\Engage\tasks\TaniumRunAsUser.exe"
Start-Process -FilePath $fileName -ArgumentList $arguments
```



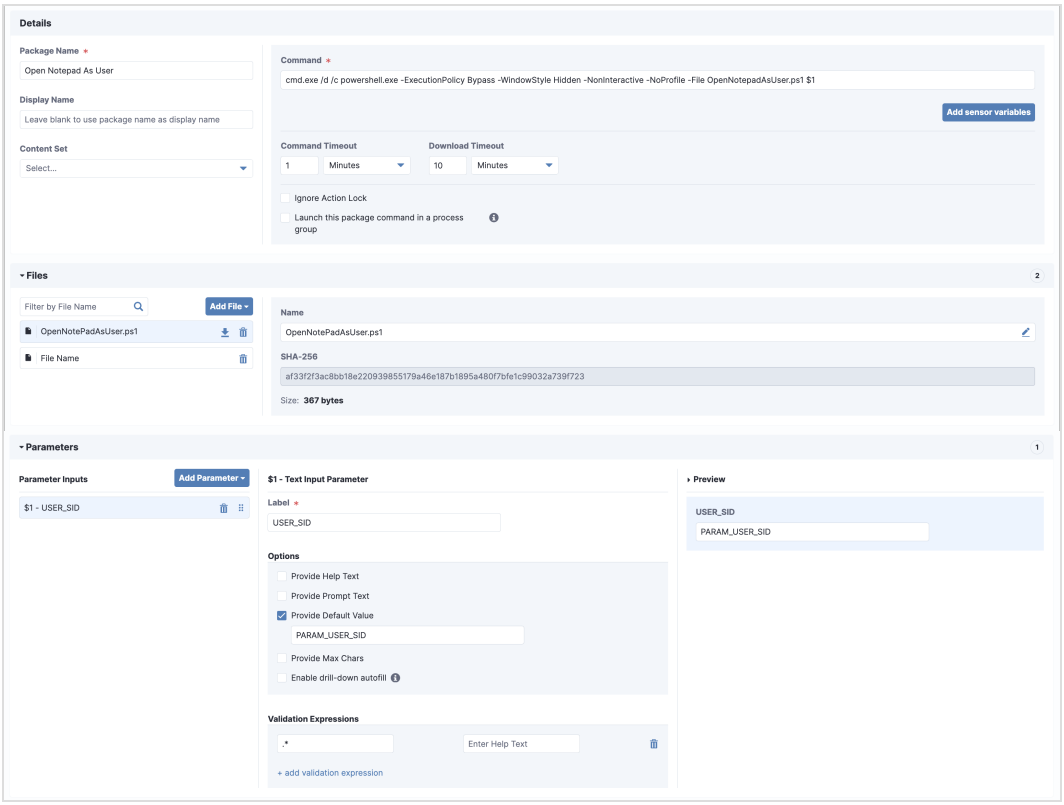

Follow these guidelines in your script to prevent potential security issues, such as privilege escalation or malicious code execution:

- The `TaniumRunAsUser.exe` file should be run from the default Tanium Client path, at: *<Tanium Client>*`\Tools\Engage\tasks\TaniumRunAsUser.exe`. Use the path exactly as it is provided in the `OpenNotePadAsUser.ps1` code sample.
- Any commands that run from within your package file should run from explicitly specified paths that are not writable by non-admin users. For example, the following command includes a path that is not writable: `"<Tanium Client>\Tools\Engage\tasks\TaniumRunAsUser.exe" /noconsole /wrap /userenv /sessionid= /cmd "cmd.exe /d /c start "non\user\writable\path\TARGET_PROCESS"`
- If the `TaniumRunAsUser.exe` command is run with the `/userenv` switch, environment variables that are referenced from within the TARGET_PROCESS resolve to the target user's environment variables. Avoid executing scripts or executable files from within the TARGET_PROCESS using an unreliable path. A path that references user environment variables can lead to execution of unintended files.
- The self-authored package file code should validate package parameters before appending them directly to other commands.

2. Create the package in Tanium Console. From the Main menu, go to **Administration > Packages > New Package**.

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3. Enter the package details.




   a. In the **Command** field, enter the following command: **cmd.exe /d /c powershell.exe -ExecutionPolicy Bypass -WindowStyle Hidden -NonInteractive -NoProfile -File OpenNotepadAsUser.ps1 $1**

   b. Verify that **Launch this package command in a process group** is not selected.

   c. Click **Add File** and upload the `OpenNotepadAsUser.ps1` file.

   d. Click **Add Parameter > Text Input**.

   e. In the **Label** field, enter `USER_SID`.

   f. In the **Options** list, select **Provide Default Value** and then enter `PARAM_USER_SID`. Click **Save**.

   IMPORTANT

   This specific parameter placeholder, PARAM_USER_SID, is replaced with the actual user security identifier (SID) at runtime only when run as a remediation task through Engage. If you want to use this package outside of Engage, you need to manually provide the actual identifier value.

4. Choose this package when you create your remediation task. For more information, see Create remediation task on page 39.

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## Sample: (Windows with PowerShell Script) Create remediation package that runs as user

Use this sample to create a task that runs as the user answering the survey on a Windows endpoint. This script uses the `TaniumRunAsUser.exe` utility that ships with the Engage tools.

1. This sample script runs a PowerShell script in the user context on the endpoint. Create the `RunPowershellScriptAsUser.ps1` file and paste the following code into the file.

   RunPowershellScriptAsUser.ps1

   RunPowershellScriptAsUser.ps1

```
param (
    # The SID of the user
    [Parameter(Position = 0, Mandatory = $true)]
    [string]$UserSID
)

$UserSID = [system.uri]::UnescapeDataString( $UserSID )

function Get-SessionFromSid( [string] $UserSID) {
    # Assume that the user has explorer.exe running
    foreach ( $process in (Get-CimInstance Win32_Process -filter "name = 'explorer.exe'")) {
        $owners = (Invoke-CimMethod -InputObject $process -MethodName GetOwnerSid)
        foreach ($owner in (Where-Object -InputObject $owners -Property ReturnValue -EQ 0)) {
            if ($UserSID -eq $owner.SID) {
                return $process.SessionId
            }
        }
    }
}

# you should check that this is not $null and exit gracefully
$sessionId = Get-SessionFromSid $UserSID
```

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```
23 if ($sessionId -eq $null) {
24     Write-Error "Could not find session for user SID: $UserSID"
25     exit 1
26 }
27
28 # Take note of the extra quotes around the inner command
29 $command = "powershell.exe -NoProfile -ExecutionPolicy bypass -File
   .\TestPowerShellScript.ps1"
30
31 # Note: /sessionid=<value> is one group
32 #       /cmd is one group, and has more quotes around $command
33 #       /userenv ensures that we will load the user's environment variables
34 $arguments = ("/noconsole", "/wrap", "/userenv", "/sessionid=$sessionId", "/cmd
   ""$command""")
35
36 $fileName = "$Env:TANIUM_CLIENT_ROOT\Tools\Engage\tasks\TaniumRunAsUser.exe"
37 Start-Process -FilePath $fileName -ArgumentList $arguments
```




Follow these guidelines in your script to prevent potential security issues, such as privilege escalation or malicious code execution:

- The `TaniumRunAsUser.exe` file should be run from the default Tanium Client path, at: *<Tanium Client>*`\Tools\Engage\tasks\TaniumRunAsUser.exe`. Use the path exactly as it is provided in the `RunPowershellScriptAsUser.ps1` code sample.
- Any commands that run from within your package file should run from explicitly specified paths that are not writable by non-admin users. For example, the following command includes a path that is not writable: `"<Tanium Client>\Tools\Engage\tasks\TaniumRunAsUser.exe" /noconsole /wrap /userenv /sessionid= /cmd "cmd.exe /d /c start "non\user\writable\path\TARGET_PROCESS"`
- If the `TaniumRunAsUser.exe` command is run with the `/userenv` switch, environment variables that are referenced from within the TARGET_PROCESS resolve to the target user's environment variables. Avoid executing scripts or executable files from within the TARGET_PROCESS using an unreliable path. A path that references user environment variables can lead to execution of

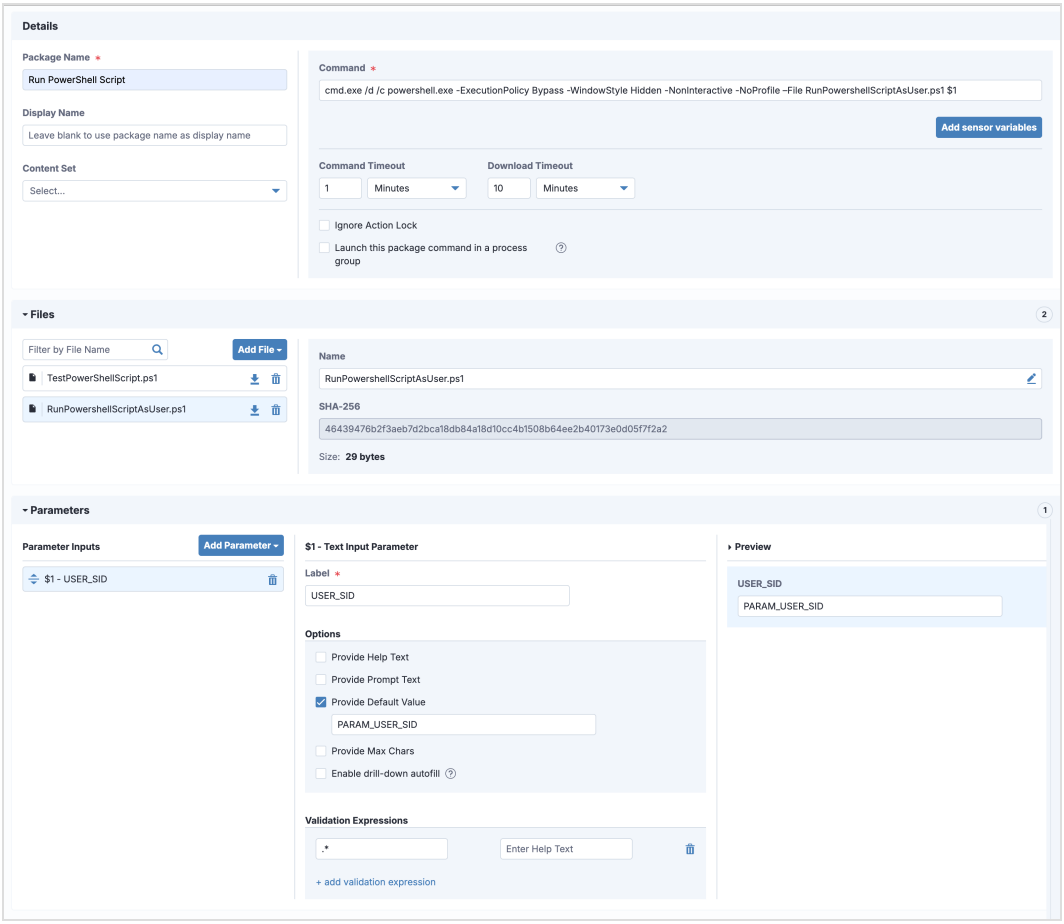
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IMPORTANT

unintended files.

- The self-authored package file code should validate package parameters before appending them directly to other commands.

2. In the `RunPowershellScriptAsUser.ps1` file, replace the command variable `RunPowershellScriptAsUser.ps1` with your PowerShell script file.
3. Create the package in Tanium Console. From the Main menu, go to **Administration > Packages > New Package**.
4. Enter the package details.




   a. In the **Command** field, enter the following command: **cmd.exe /d /c powershell.exe -ExecutionPolicy Bypass -WindowStyle Hidden -NonInteractive -NoProfile -File RunPowershellScriptAsUser.ps1 $1**

   b. Verify that **Launch this package command in a process group** is not selected.

   c. Click **Add File** and upload the `RunPowershellScriptAsUser.ps1` file.

   d. Click **Add File** and upload your PowerShell script file.

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e. Click **Add Parameter > Text Input**.

f. In the **Label** field, enter `USER_SID`.

g. In the **Options** list, select **Provide Default Value** and then enter `PARAM_USER_SID`. Click **Save**.




This specific parameter placeholder, PARAM_USER_SID, is replaced with the actual user security identifier (SID) at runtime only when run as a remediation task through Engage. If you want to use this package outside of Engage, you need to manually provide the actual identifier value.

5. Choose this package when you create your remediation task. For more information, see Create remediation task on page 39.

## Sample: (macOS with Shell Script and TXT File) Create remediation package that runs as user

Use this sample to create a task that runs as the user answering the survey on a macOS endpoint.

1. This sample script writes the user's home directory to a text file. Create the `run-as-user-sample.sh` file and paste the following code into the file:

   run-as-user-sample.sh

   run-as-user-sample.sh

```
#!/bin/sh
#@INCLUDE=i18n/UTF8Decode.sh
#@START_INCLUDES_HERE

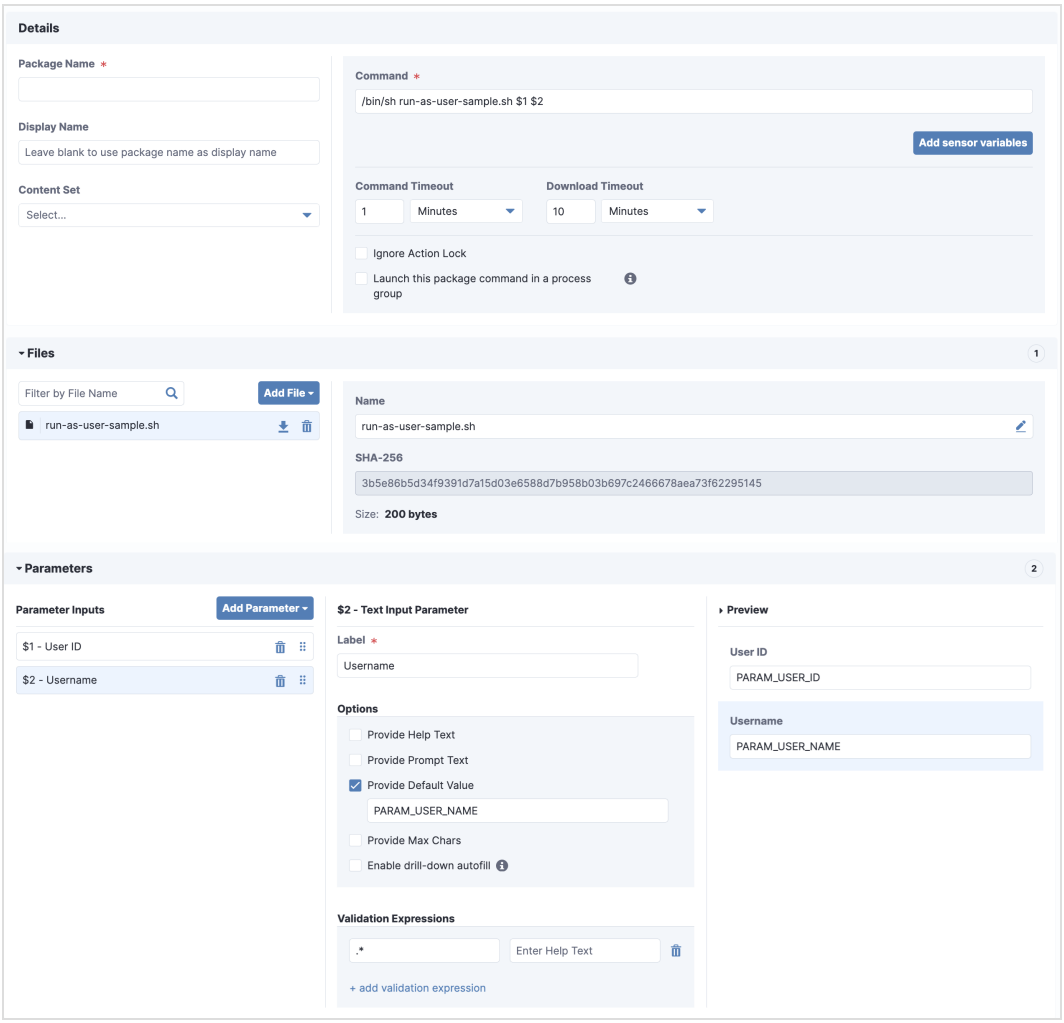
user_id=$(utf8decode "$1")
username=$(utf8decode "$2")

launchctl asuser ${user_id} sudo -Hu ${username} /bin/sh -c 'echo $HOME >>
$HOME/echoed.txt'
```

2. Create the package in Tanium Console. From the Main menu, go to **Administration > Packages > New Package**.

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3. Enter the package details.




a. In the Command field, enter the following command: `/bin/sh run-as-user-sample.sh $1 $2`

b. Verify that **Launch this package command in a process group** is not selected.

c. Click **Add File** and upload the `run-as-user-sample.sh` file.

d. Click **Add Parameter > Text Input** to define the first input, $1.

e. In the **Label** field, enter `User ID`.

f. In the **Options** list, select **Provide Default Value** and then enter `PARAM_USER_ID`.

g. Click **Add Parameter > Text Input** to define the second input, $2.

h. In the **Label** field, enter `Username`.

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i. In the **Options** list, select **Provide Default Value** and then enter `PARAM_USER_NAME`. Click **Save**.

> **IMPORTANT** The specific parameter placeholders, PARAM_USER_ID and PARAM_USER_NAME, are replaced with the actual user identifier and username at runtime only when run as a remediation task through Engage. If you want to use this package outside of Engage, you need to manually provide the actual values for the user identifier and username.

4. Choose this package when you create your remediation task. For more information, see Create remediation task on page 39.

## Sample: (macOS with Shell Script) Create remediation package that runs as user

Use this sample to create a task that runs as the user answering the survey on a macOS endpoint.

1. This sample script runs a Shell script in the user context on the endpoint. Create the `RunScriptAsUser.sh` file and paste the following code into the file:

   RunScriptAsUser.sh

   RunScriptAsUser.sh

```
#!/bin/sh

awk_script='
function hex_to_octal(hex) {
decimal=hex_to_decimal(hex)
return sprintf("\\0%03o", decimal)
}

function hex_to_decimal(value, result) {
for(j=1; j<=length(value); j++) {
result=(result*16) + HEX[substr(value, j, 1)]
}
return(result)
}

function convert(s) {
```

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```
while(match(s, /%../)) {
encoded=substr(s, RSTART, RLENGTH)
sub(encoded, hex_to_octal(encoded), s)
}
return s
}

BEGIN {
HEX["0"] = 0
HEX["1"] = 1
HEX["2"] = 2
HEX["3"] = 3
HEX["4"] = 4
HEX["5"] = 5
HEX["6"] = 6
HEX["7"] = 7
HEX["8"] = 8
HEX["9"] = 9
HEX["a"] = 10
HEX["b"] = 11
HEX["c"] = 12
HEX["d"] = 13
HEX["e"] = 14
HEX["f"] = 15
HEX["A"] = 10
HEX["B"] = 11
HEX["C"] = 12
HEX["D"] = 13
HEX["E"] = 14
HEX["F"] = 15
}

{
```

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```
printf("%s\n", convert($0))
}
'

usable_awk() {
if found=`command -v nawk`; then
echo "$found"
return
fi

if [ -x /usr/xpg4/bin/awk ]; then
echo /usr/xpg4/bin/awk
return
fi

command -v awk
}

utf8decode() {
awk_bin=`usable_awk`
printf "%b\n" "`echo "$1" | $awk_bin "$awk_script"`"
}

user_id=$(utf8decode "$1")
username=$(utf8decode "$2")

if [ -z ${username} ]; then
echo "No username specified."
usage
fi

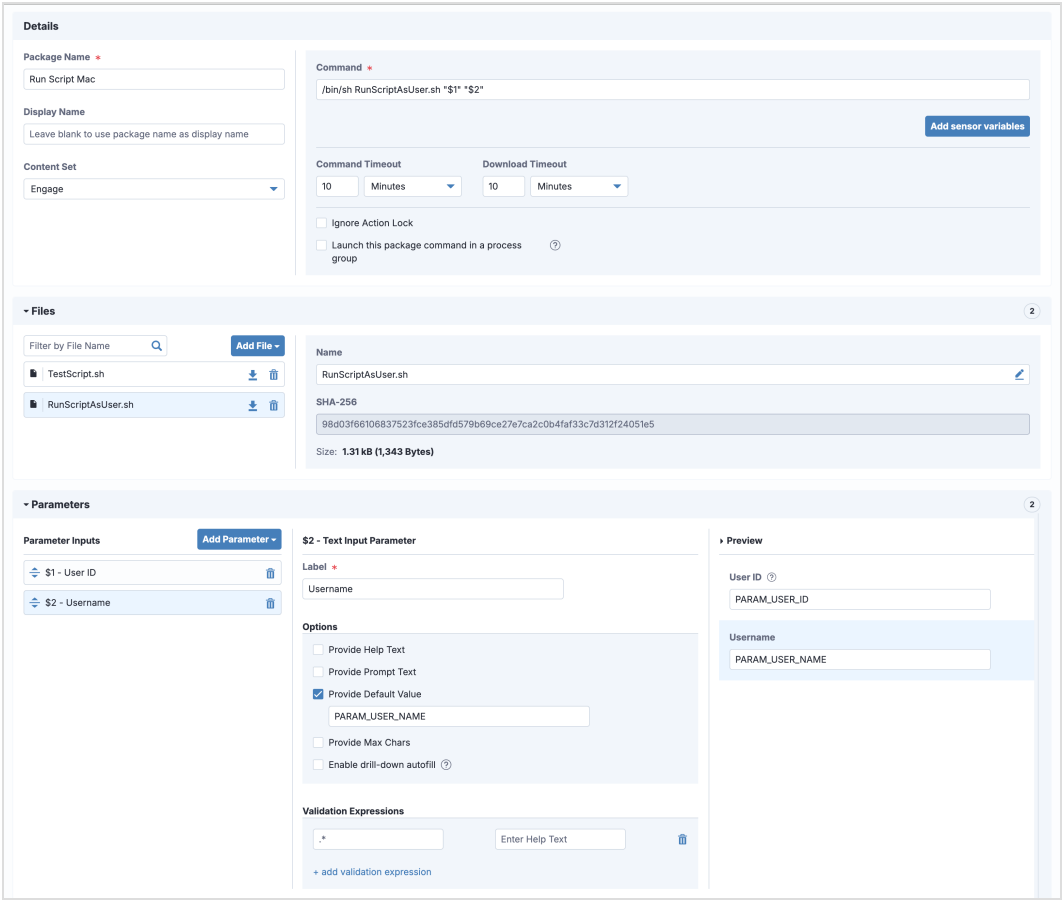
if [ -z ${user_id} ]; then
echo "No user id specified."
```

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```
usage
fi

launchctl asuser ${user_id} sudo -Hu ${username} /bin/sh ./TestScript.sh
```

2. In the `RunScriptAsUser.sh` file, replace the command variable `TestScript.sh` with your Shell script file.
3. Create the package in Tanium Console. From the Main menu, go to **Administration > Packages > New Package**.
4. Enter the package details.




   a. In the Command field, enter the following command: `/bin/sh RunScriptAsUser.sh $1 $2`
   b. Verify that **Launch this package command in a process group** is not selected.
   c. Click **Add File** and upload the `RunScriptAsUser.sh` file.
   d. Click **Add File** and upload your Shell script file.

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e. Click **Add Parameter > Text Input** to define the first input, $1.

f. In the **Label** field, enter `User ID`.

g. In the **Options** list, select **Provide Default Value** and then enter `PARAM_USER_ID`.

h. Click **Add Parameter > Text Input** to define the second input, $2.

i. In the **Label** field, enter `Username`.

j. In the **Options** list, select **Provide Default Value** and then enter `PARAM_USER_NAME`. Click **Save**.




The specific parameter placeholders, PARAM_USER_ID and PARAM_USER_NAME, are replaced with the actual user identifier and username at runtime only when run as a remediation task through Engage. If you want to use this package outside of Engage, you need to manually provide the actual values for the user identifier and username.

5. Choose this package when you create your remediation task. For more information, see Create remediation task on page 39.

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# Creating notifications

A notification contains information for users that require only an acknowledgment or dismissal. Notifications are sent to all users of an endpoint and show up on the endpoint as a Tanium End-User Notifications notification message. Unlike a survey that contains multiple questions and is designed to collect feedback from users, a notification is a statement of information.

Use notifications to notify employees of operational and service issues. You can also send notifications to communicate announcements about training, policy updates, and organizational changes. You can send notifications to targeted groups of endpoints and optionally include trigger conditions. You can also include a remediation for each notification. For example, you might create a notification targeted at developers that informs them that your IT organization is aware of an issue with the development software that they use.




These notifications are independent of survey notifications. Surveys include a different type of notification to inform users about the surveys. For more information about survey notifications, see Creating surveys on page 25.

For more information about example scenarios, see Notification examples.

## Create a theme

You can create themes for notifications to customize how they appear to end users. To create and edit themes, you must have a role with the **Engage Themes** Write permission.

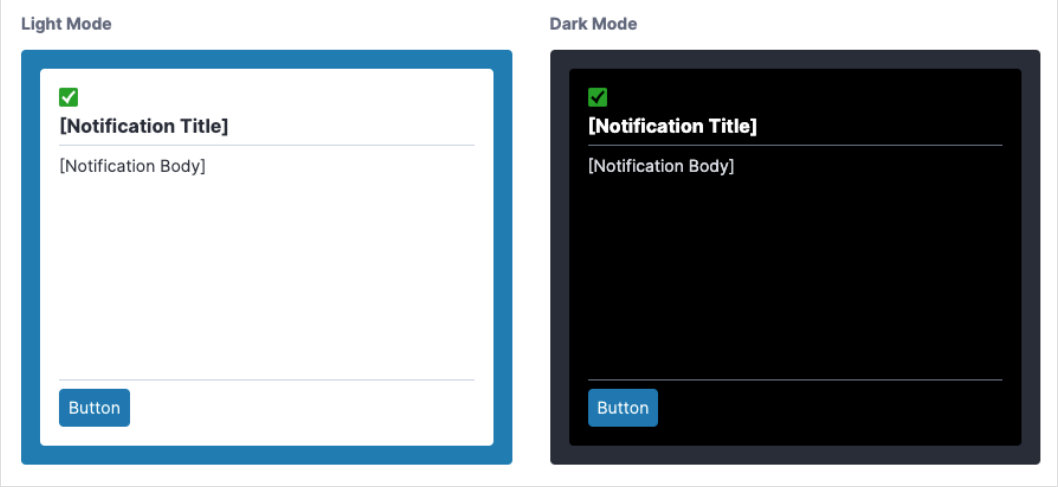
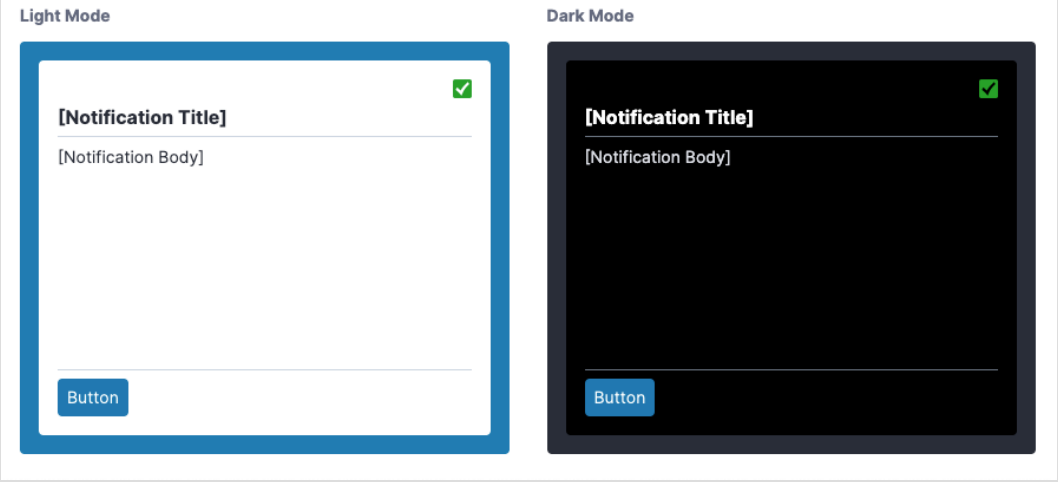
1. From the Main menu, go to **Modules > Engage > Notification Themes**.
2. Click **Create Theme**.
3. In the **Overview** section, enter a name for the theme and an optional description.
4. In the **Theme Definition** section, edit any of the following options:

**Theme options**

| Option | Description |
|---|---|
| Border Color | Select the border color of the notification window. You can choose different colors for light mode and dark mode. |
| Button Color | Select the color of the acknowledgment button. You can choose different colors for light mode and dark mode. |

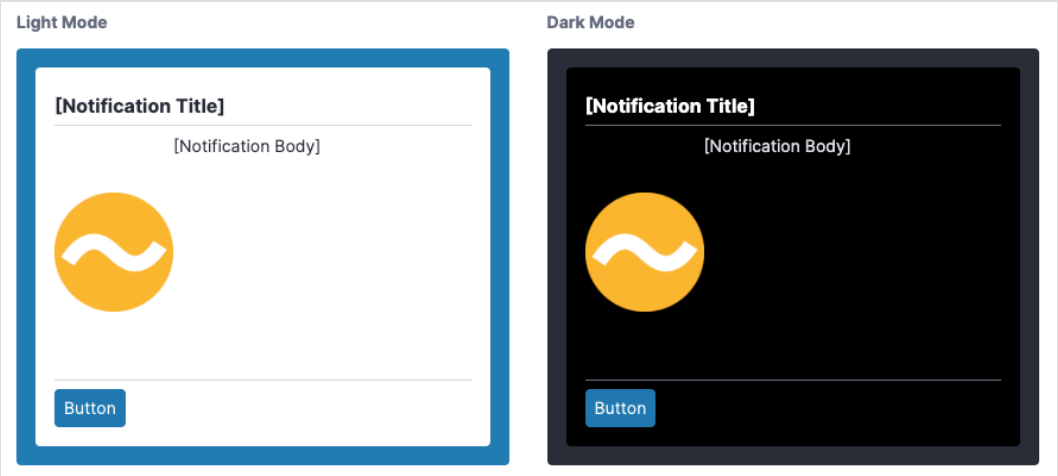
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**Theme options (continued)**

| Option | Description |
| --- | --- |
| Left Image | Upload an image that appears on the left side of the window above the notification title, and then add alternative text for accessibility.<br> |
| Right Image | Upload an image that appears on the right side of the window above the notification title, and then add alternative text for accessibility.<br> |

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**Theme options (continued)**

| Option | Description |
|---|---|
| Body Image | Upload an image to appear in the body of the notification, select if you want the image to appear to the left or right of the notification text, and then add alternative text for accessibility.<br> |

5. Review the **Theme Preview** section and then click **Submit**.

The new theme is available to use for notifications.

NOTE

You can edit themes as necessary and delete unused themes. If you edit a theme, the update is applied almost immediately to any currently running or scheduled notifications.

## Create notification

1. From the Main menu, go to **Modules > Engage > Notifications**.
2. Click **Create Notification** and then select an option from the list.
    - **Blank Survey**: Start with a blank form and complete the fields to build a new notification.
    - **From Template**: Load a notification template that includes predefined trigger conditions, notification settings, and remediation tasks. You can refine the notification properties to suit your needs. The following templates are available by default:

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**Notification templates**

| Template name | Use case | Remediation task |
|---|---|---|
| AI Tools Policy | Remind your employees to read your corporate AI tools policy. | Link: *<Add a related link to your company site>* |
| Clear Microsoft Teams Cache | Improve your employees' Microsoft Teams performance by suggesting them to clear cache on their device. | Task: Clear Microsoft Teams Cache |
| Compliance Training | Remind your employees to complete time-sensitive tasks, such as corporate compliance training. | Link: *<Add a related link to your company site>* |
| Phishing Awareness Reminder | Share security best practices with your employees. | Link: *<Add a related link to your company site>* |
| Poor Network Performance[1] | Recommend ways to improve network performance for endpoints with poor network connections. | None |
| Quarterly Expenses Are Due | Remind your employees to submit their quarterly expenses. | Link: *<Add a related link to your company site>* |
| Restart Required | Suggest a reboot for endpoints that have not restarted within the last 7 days. | Task: Restart Endpoint |
| Zoom Outage | Notify employees of service disruptions, such as Zoom outages. | None |

[1]Requires the Tanium Performance solution.

3. Enter a title and optional description. The title appears to the user in the notification on the endpoint.
4. (Optional) Define one or more trigger conditions. A trigger condition defines when the end user of the endpoint receives the notification. The trigger condition can be based on a Tanium sensor. If you do not define trigger conditions, the notification is sent to end users on all targeted endpoints; you define targets when you send the notification.
    a. Click **Add Condition**, then click **+ Row** or **+ Group** to define the trigger condition.
    b. Click **Apply** ☑ to save the condition, then click **Save**.
    c. In **Minimum time between notifications**, specify the amount of time between notifications that the user receives on the endpoint. Endpoints must still match any trigger conditions to receive the notification.
5. Configure the notification.
    - Select the **Original Language** of the notification. You can provide translations in the **Multi-Language Support** section.
    - (Optional) Select a **Theme**. Themes apply to both toast and modal notifications. To create additional themes, see Create a theme on page 53.
    - Select if you want the notification to appear in the lower right corner of the screen as a **Toast** or to take focus as a **Modal**.
    - Enter and format the **Notification Text**.

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- Enter the **Button Text**.
- Select a **Remediation**.
    - Select **None** if no remediation is necessary.
    - Select **Link** to include a link for the user. For example, you can include a link to open a ticket with the IT help desk. The link must start with `https://`.
    - Select **Task** to deploy a task to the endpoint when the user clicks the button. You can choose from the following predefined tasks in addition to any custom tasks defined in your environment:

      **Restart Endpoint**

      Restarts the target device.

      **Clear Microsoft Teams Cache**

      Clears cache to resolve problems with Microsoft Teams.

      **Clear DNS Cache**

      Clears DNS cache to help resolve network issues.

      **Enable / Disable Fast Start**

      Enables or disables the Windows OS Fast Start feature.

      **Restart <application>**

      Restarts the (macOS) Apple Safari, Cisco Webex, Google Chrome, Microsoft Edge, Microsoft Outlook, Microsoft Teams, Mozilla Firefox, Slack, or Zoom application.

      **User Disk Cleanup**

      Performs light (Recycle bin empty) clean.

- Preview the notification. The notification appears in dark mode or light mode based on endpoint settings.

6. (Optional) Add multi-language support. Click **Add Languages**, select one or more languages, expand each language you selected, and enter the translated text. The default notification language is based on the locale and OS of the user.

   The **Add Languages** option is disabled until you add the **Notification Title** and **Notification Text**.

7. Save the notification. You can either save the notification as a draft or save and schedule the notification to run.

## Schedule notification run

When you create a notification, the notification is in draft mode until you schedule it to run. When a notification runs, the notification is sent to the targeted endpoints and appears to endpoint users when trigger conditions are met. If the notification does not contain any trigger conditions, the notification appears to all end users on targeted endpoints.

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1. From the Main menu, go to **Modules > Engage > Notifications**.
2. Click the name of the notification that you want to schedule.
    a. If the notification has a **Draft** status, click **Save and Schedule** to edit the schedule.
    b. If the notification has a **Done** status, you must clone the notification to rerun it. For more information, see Clone notification on page 58.
    c. If the notification has a **Scheduled** or **Running** status, click **End Notification** and then clone the notification. For more information, see Clone notification on page 58.
3. Set a **Start Time** and **End Time**. The **End Time** includes the following options:
    a. **Scheduled**: Set a date and time for the notification to stop running.
    b. **None**: Do not set an end time and let the notification run indefinitely.
    You can also choose to use UTC (default) or the endpoint local time to schedule the survey.
4. Select one or more computer groups to target with the notification. Only endpoints in the computer groups are eligible to receive the notification. The user that creates the notification must have management rights to this computer group. To assign computer groups to a user, see Tanium Platform User Guide: Manage computer group assignments for a user.
5. Click **Run Notification**.

The notification runs according to the criteria that you select. To end a running notification, open the notification from the **Notifications** page and click **End Notification**.

## Clone notification

Clone an existing notification to create similar notifications or to run a notification again. You can clone notifications that are in the **Running** or **Done** state.

1. From the Main menu, go to **Modules > Engage > Notifications**.
2. Select the notification that you want to clone by using one of the following methods:
    - Click the name of the notification. The **Notification Details** page appears.
    - Select the checkbox for the notification. The Clone icon appears in the **Notifications** grid header.
3. Click Clone and then edit the notification details.
4. Save the notification. You can either click **Save as Draft** or **Save and Schedule**.

## View existing notification status

You can view the latest notifications on the Engage **Overview** page. To view all notifications, from the Engage menu, go to **Notifications**.

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**Notification status icons**

| Status | Description |
|---|---|
|  | The notification is in draft mode. Finish editing and schedule the notification run. |
|  | The notification is currently running against targeted endpoints. |
|  | The notification is scheduled to run at a future date and time. |
|  | The notification is done. |
|  | An error occurred when scheduling or sending the notification. |

## Delete notification

You can delete notifications that are in the **Draft**, **Done**, or **Error** state.



To end a running or scheduled notification, open the notification from the **Notifications** page and click **End Notification**.

1. From the Main menu, go to **Modules > Engage > Notifications**.
2. Click the name of the notification that you want to delete.
3. Click Delete .

Engage deletes the notification and returns to the **Notifications** page.

## Export and import notifications

You can export notifications from one environment and import them to another environment. For example, export notifications from a test environment and import them to a production environment.

### Export notification

1. From the Main menu, go to **Modules > Engage > Notifications**.
2. To export all notifications, click **Export All**.



To export a subset of notifications, select one or more notifications and then click **Export**. You can also export an individual notification by clicking **Export** in the View Details  panel.

A JSON file downloads to the browser download folder.

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## Import notification

1. From the Main menu, go to **Modules > Engage > Notifications**.
2. To import previously exported notifications, click **Import** and then provide the previously downloaded JSON file.

If you import a notification that has the same name as an existing notification, Engage appends **[<#>]** to the name of the imported notification. For example, if ***Notification_Name*** already exists, then Engage imports it as ***Notification_Name [1]***.

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# Troubleshooting Engage

If Engage is not performing as expected, you might need to troubleshoot issues or change settings.

## Collect logs

### Collect troubleshooting package for Engage

The information is saved as a ZIP file that you can download with your browser.

1. From the Engage **Home** page, click Help , then the **Troubleshooting** tab.
2. Click **Download Support Bundle**.
   A `tanium-Engage-support.[number].zip` file downloads to the local download directory.
3. Contact Tanium Support to determine the best option to send the ZIP file. For more information, see Contact Tanium Support on page 62.

### Collect troubleshooting information from endpoints

You can use Client Management to directly connect to an endpoint and collect a bundle of logs and other artifacts, sometimes referred to as an *Endpoint Must Gather* (EMG).

1. From the Main menu, go to **Shared Services > Client Management**.
2. From the Client Management menu, click **Client Health**.
3. In the **Direct Connect** search box, enter all or part of an IP address or a computer name.
   Matching results appear after the search completes.
4. From the search results, click the computer name to connect to the endpoint.
5. Click the **Gather** tab. For the **Domain** filter, select the domain and category name for which you want to gather troubleshooting information. You can optionally filter the category list by domain.




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6. Click **Gather from Endpoint**.

   The selected logs and artifacts are gathered from the endpoint. The package appears in the **Must Gathers** section, and the name of the package corresponds with its time stamp.

7. When **Finished** appears in the **Run State** column, select the package and click **Download** to download a ZIP file that contains the troubleshooting information.

## Verify endpoint tools

If you are experiencing issues such as a feature not working on an endpoint or seeing incorrect data in the workbench, confirm that your endpoints have the latest toolset version. For more information, see Tanium Endpoint Configuration User Guide: Identify and resolve issues with endpoint tools or Client Extensions.

## Contact Tanium Support

To contact Tanium Support for help, sign in to the Tanium Customer Community.

For more information about how to submit a support case, see Case Submission Form.

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# Reference: Engage endpoint tools

NOTE

Each solution includes a tool with the same name as the solution that appears in the Endpoint Configuration Toolset manifest but that does not appear in the following table. This tool is not deployed to the endpoint itself, but it manages the endpoint tooling dependencies for the solution, as listed in the table.

**Endpoint tools for Tanium Engage**

| Tool | Description |
|---|---|
| core-cx | Provides a management framework API for all other Client Extensions and exposes operating system metrics |
| cx-config | Provides installation and configuration of extensions on an endpoint |
| end-user-cx | Provides a mechanism to send surveys to collect qualitative feedback from endpoint users |
| End-User Notifications | Provides End-User Notifications code |
| python27 | Provides legacy TPython binary and libraries |
| python38 | Provides TPython binary and libraries for endpoints with a toolset version earlier than 2.7 |
| python312 | Provides TPython binary and libraries for endpoints with toolset 2.7 or later |
| Tanium EUSS | Provides End-User Self Service code |

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