

Tanium™ Reporting User Guide

Autonomous IT. Unstoppable Business.

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Reporting overview

Use Tanium™ Reporting to explore real-time visualizations of your endpoint data, create custom reports and charts from the data, and export data to share with key stakeholders. For example, you can use the **Risk and Compliance - Impact Rating** report to analyze the potential impact if a compromise occurs on endpoints. If users want to check impact ratings regularly, you can add the ratings as a chart to a dashboard and users can then add the dashboard to their Tanium **Home** page for quick access.

Reporting includes the following features:

- **Data exploration**

  View data across Tanium solutions (modules and shared services). For example, Reporting dashboards show endpoint coverage and other health metrics in the workbenches of solutions such as Tanium™ Benchmark. Reporting provides advantages over saved questions in Tanium™ Interact for viewing endpoint data, as described in Tanium™ Console User Guide: Viewing results in Interact or Reporting.

- Reports on page 15

  Use reports to show endpoint data in grid format and add Charts on page 18 to help visualize the data. Use Tanium-managed reports on page 16 to address common scenarios or create custom reports for scenarios that are specific to your environment.

- Dashboards on page 19

  Use a dashboard to organize a collection of chart, action, and text panels for quickly visualizing data from one or more reports, alerting users to important events in your environment, and deploying actions based on the events. Use Tanium-managed dashboards on page 22 to address common scenarios or create custom dashboards for scenarios that are specific to your environment.

- **Current and cached data**

  View current data for online endpoints, stored data for offline endpoints, and historical data for specific time periods.

- **Exports and imports**

  Share reports and dashboards with other users, or copy reports and dashboards between Tanium Servers.

- **Single endpoint management**

  View comprehensive details and perform management tasks for a single endpoint, as described in Working with a single endpoint on page 143.

Data sources

Data sources provide the information that you use to create views of endpoint data on the **Explore Data** page, create reports, create dashboards, or create sensor details panels on the Endpoint Details page. Reporting data comes from two types of sources: registered sensors and module sources.

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NOTE

For a dashboard chart that is based on a report, the data source is the combination of the report and certain chart settings. For more information, see Chart data sources on page 137.

Data sources on page 171 lists all the requirements for using data sources in Reporting.

Registered sensors

Sensors become available as data sources in Reporting after they are registered with Tanium™ Data Service (TDS). The Tanium Server automatically collects data from registered sensors by issuing questions to all managed endpoints. TDS then stores the data and Reporting retrieves the data from TDS. Reporting automatically registers some sensors and you can manually register other sensors. For more information about related procedures, see Tanium Interact User Guide: Managing Tanium Data Service (TDS).

NOTE

Certain sensors, such as sensors that provide duplicate data, are intentionally unavailable in Reporting, even if you register the sensors. For more information about these sensors, see Unavailable sensors in Reporting on page 171.

When you work in the Explore data on page 14 page or Edit reports on page 75, the **Source Data** panel lists all the registered sensors that you can select to view endpoint data. The panel also lists sources of data that are not present on endpoints and therefore do not derive from registered sensors. For example, Tanium™ Impact analyzes Active Directory domains to calculate values for the **Impact Rating** data source instead of collecting the values from registered sensors. For more information about distinguishing between sources that are present or not present on endpoints, see View source details on page 65.

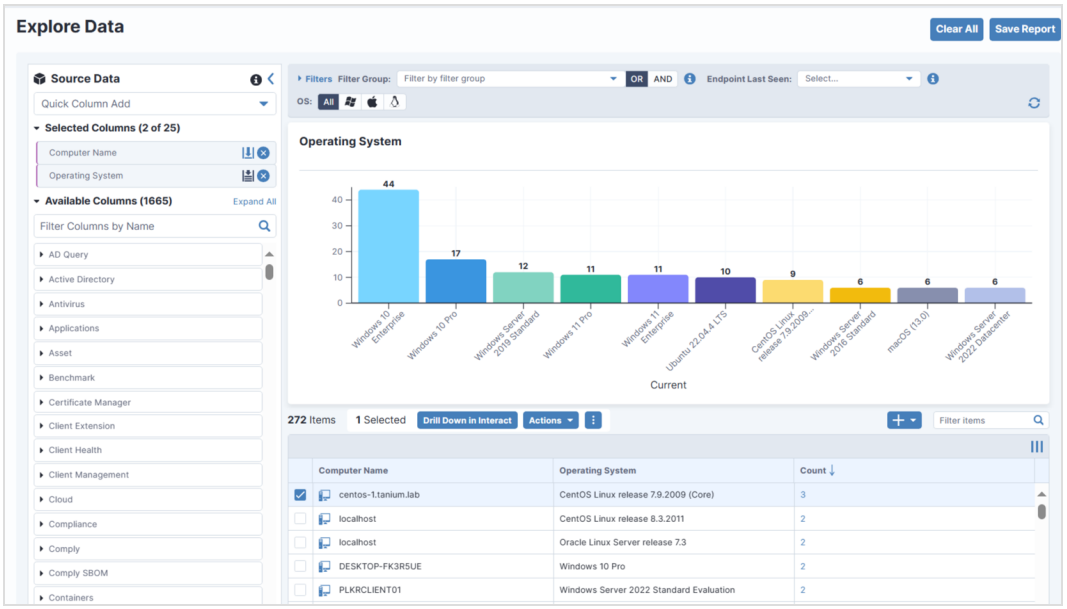
Module sources

Module sources provide data through a Tanium solution and are created automatically when you import the solution. For example, when you import the Tanium™ Deploy module, it provides the **Mean Time to Deploy** source, which tracks the number of days between the creation and installation of a package for updating software. You can select module sources as the data sources for dashboard charts in Reporting, but you cannot create or edit module sources. The intervals at which Tanium solutions push updated module source data to Reporting varies by solution. You cannot use module sources on the **Explore Data** page, in reports, or on sensor details panels within the Endpoint Details page.

Explore data

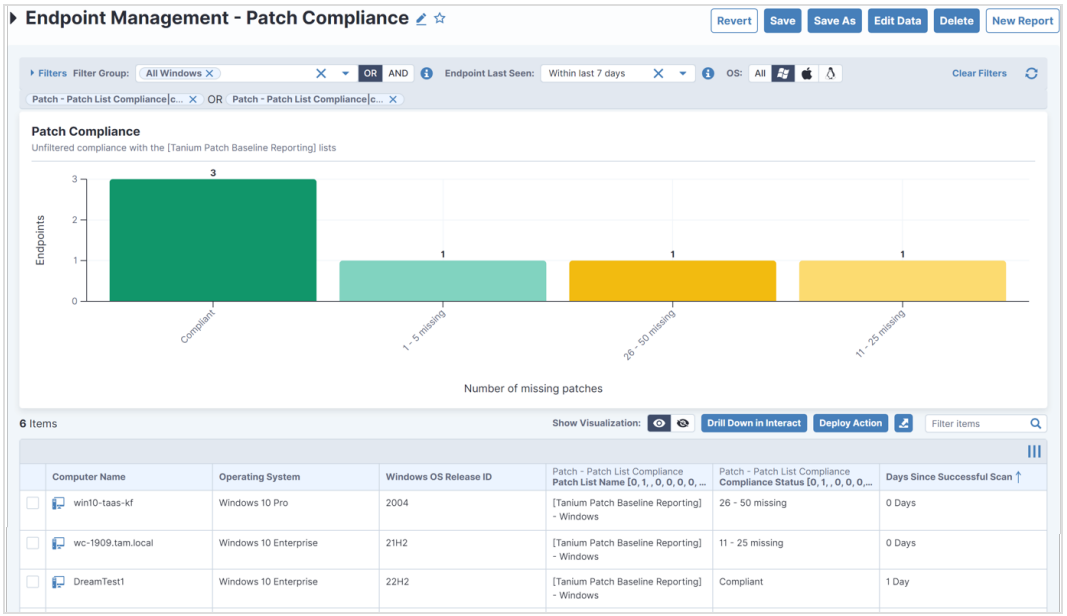
Reporting provides an **Explore Data** page for creating a view of endpoint data in grid format and configuring a chart to visualize the data. You create the view by adding data sources as grid columns and optionally configuring filters to limit the data. If you then save the view as a custom report, users can later open it to see the latest data from endpoints. For more information, see Explore data and create reports on page 63.

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Reports

A report shows endpoint data in grid format, where the columns are data sources such as sensors. If a single data source produces multiple columns of results, the column headings show the data source name above the column names. A report can include a chart to help visualize the data. You can use Reporting to view Tanium-managed reports and create custom reports. You select the data sources to include in reports and optionally add filters to limit the data. For example, you can filter based on computer groups or endpoint OS.



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For more information about reports and related tasks, see Working with Reporting reports on page 48.

Tanium-managed reports

Reporting provides predefined Tanium-managed reports that you can use to address scenarios that are common to many Tanium environments.

Access Tanium-managed reports

To view Tanium-managed reports in Tanium Console, go to **Data > Reports** and select one or more **Tanium Managed** options for the **Author** filter. To view the reports that other Tanium solutions provide, set the **Author** to **Tanium Managed - <*Solution*>**. For example, to see the reports that Tanium™ Patch provides, select the **Tanium Managed - Patch** author. When you open a Tanium-managed report, its header shows the label **Tanium Managed.**

For more information about viewing reports, see View reports on page 48.



To access all content in **Tanium Managed** reports, you must install all feature-specific solution dependencies. For more information, see Solution dependencies on page 30.

Update or copy Tanium-managed reports

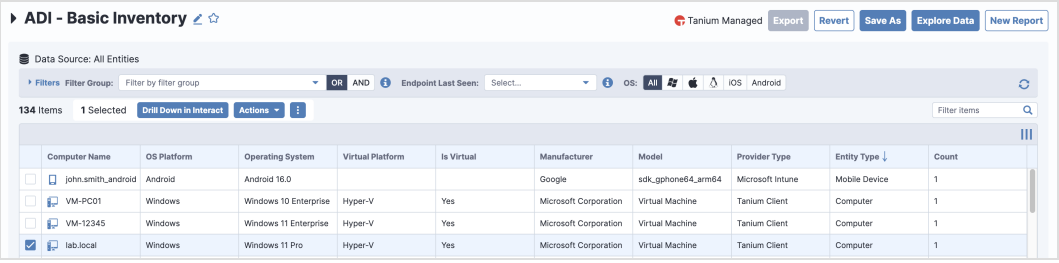
You cannot edit or delete Tanium-managed reports, but you can assign them to a different content set to limit access and you can assign labels (see Edit reports on page 75). You can also clone a report and edit the clone (see Clone reports on page 74) or copy the report settings to the **Explore Data** page to save as a new report (see Explore data on page 54).

Example of Tanium-managed report

ADI - Basic Inventory is an example of a Tanium-managed report that shows basic platform details about the endpoints in your environment where the Tanium Client is installed. After you initially deploy Tanium, your operations and security teams can use the report for basic visibility into your inventory to address questions such as:

- Are any endpoints unmanaged? If you know certain endpoints exist but do not appear in the report, the Tanium Client might not be running on them. You can use Tanium™ Discover to find unmanaged Windows, macOS, or Linux endpoints and use Tanium™ Client Management to deploy the Tanium Client to those endpoints.
- Are most endpoints virtual or non-virtual? This can affect administration and licensing because virtual endpoints often have a higher turnover rate with respect to coming online and going offline.
- For which OSs do you need to implement a patching process? For example, if all your endpoints run Windows or macOS, you do not need a patching process for Linux endpoints.

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To create a version of the **ADI - Basic Inventory** report with additional columns (such as **Container Host Operating System**), you can click the **Explore Data** button to copy the report settings to the **Explore Data** page, add the columns, and save the report as a custom report with a new name.

Flattened data

Reporting flattens grid data that appears in reports and on the **Explore Data** page. Flattening dedicates one row for each result that a data source provides. For example, consider a report that contains a column for **Installed Applications - Name** and a column for **Computer Name**. The **Installed Applications - Name** source can return multiple applications for each endpoint. If you flatten the report by **Computer Name**, each row contains the computer name of the endpoint with all its installed applications.

You select the column (data source) to use for flattening when you Explore data and create reports on page 63. You can select only one column for flattening. If you select a source that is a multi-column sensor, flattening applies to the data for all the columns in that sensor. By default, flattening applies to the first column that you add, but you can change the flattened column.

You must edit an existing report to change its flattened column (see Edit reports on page 75). If you remove the source for a flattened column from a report, the first column in the report becomes the flattened column. If a report provides chart data to any dashboards, you cannot change the flattened column in that report. If any dashboards use the report, you cannot save the report after you change the flattened column.

Flattening examples

Consider a table that contains columns from two data sources: **Computer Name** and **Installed Applications - Name**. The following table shows the data for three endpoints, where the data is flattened by the **Computer Name**:

Example of data flattened by Computer Name

Computer Name	Installed Applications - Name	Count
BOB-PC	Microsoft Edge Google Chrome Mail	1
MARY-LAPTOP	Microsoft Edge Google Chrome VMWare Tools	1

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Example of data flattened by Computer Name (continued)

Computer Name	Installed Applications - Name	Count
TEST-PC	Microsoft Edge VMWare Tools Mail	1

The following table shows the same data flattened by **Installed Applications - Name**. Because the **Installed Applications** source contains multiple columns, each result appears in a dedicated row. Note that each unique combination of **Computer Name** and **Installed Application - Name** now appears in a dedicated row as a result.

Example of data flattened by Installed Application - Name

Computer Name	Installed Applications - Name	Count
BOB-PC	Microsoft Edge	1
MARY-LAPTOP	Microsoft Edge	1
TEST-PC	Microsoft Edge	1
BOB-PC	Google Chrome	1
MARY-LAPTOP	Google Chrome	1
MARY-LAPTOP	VMWare Tools	1
TEST-PC	VMWare Tools	1
BOB-PC	Mail	1
TEST-PC	Mail	1

The following shows the same data in a table with just the **Installed Applications - Name** source, with a filter added to show only **Installed Applications - Name results that match “Google Chrome”**.

Example of data flattened by Installed Application - Name with "Installed Applications Name contains Google Chrome" filter

Installed Applications - Name	Count
Google Chrome	2

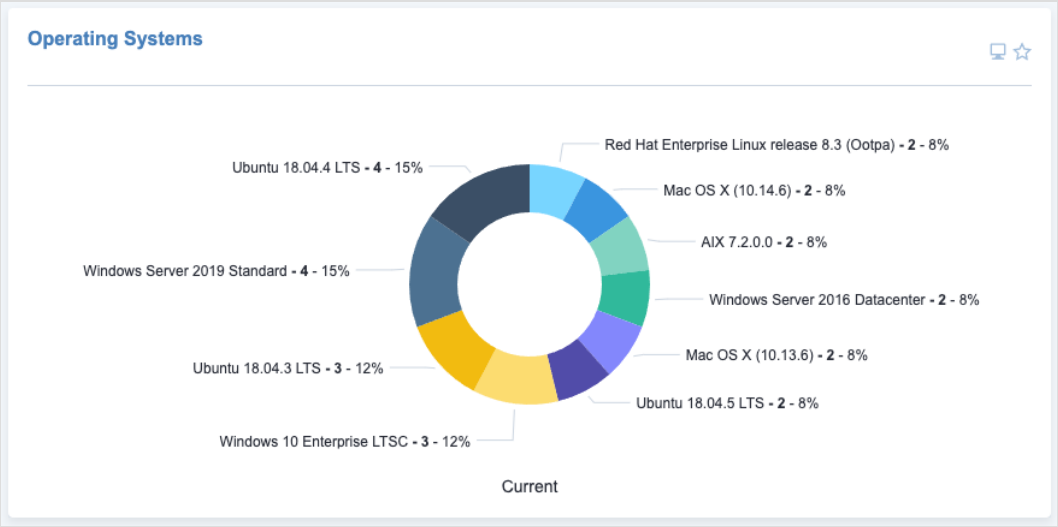
Charts

In Reporting, you can add a chart to help users visualize the source data in:

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- The **Explore Data** page.
- A report.
- A dashboard, which can have multiple charts. Dashboard charts are based on data from the associated reports or module sources.

You can customize the chart type, date range, color scheme, and other attributes.



- To add a chart to a report, see Explore data and create reports on page 63.
- To use charts in a dashboard, see Add chart panels on page 106.
- For more information about chart types, see Reference: Chart types and dates on page 180.

Dashboards

In Reporting, a dashboard organizes a collection of panels. A panel can contain a chart, text, and action deployment options. Chart panels are based on data from Reports on page 15 or Module sources on page 14. Certain Chart types on page 180 enable you to view how data changes over time. For example, you might want to see if the number of endpoints that require a certain vulnerability remediation is changing over time as a way of gauging the success rate of the remediation action. A dashboard can have one or more collapsible sections to organize related panels. For example, a section labeled **Comply** can contain all the panels with charts that are based on reports that Tanium™ Comply provides.

Example of dashboard

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For more information about dashboards and related tasks, see Working with Reporting dashboards on page 92.

Tanium-managed dashboards

Reporting provides predefined Tanium-managed dashboards that you can use to address scenarios that are common to many Tanium environments.

Access Tanium-managed dashboards

To view Tanium-managed dashboards in Tanium Console, go to **Data > Dashboards** and select one or more **Tanium Managed** options for the **Author** filter. To view the dashboards that other Tanium solutions provide, set the **Author** to **Tanium Managed - <*Solution*>**. For example, to see the dashboards that Tanium™ Engage provides, select the **Tanium Managed - Engage** author. When you open a Tanium-managed dashboard, its header shows the label **Tanium Managed.**

For more information about viewing dashboards, see View dashboards on page 92.

> NOTE
>
> Tanium-managed dashboards use data that Tanium solutions provide. To access all content in Tanium-managed dashboards, you must install all feature-specific solution dependencies. For more information, see Solution dependencies on page 30.

Update or copy Tanium-managed dashboards

You cannot edit or delete Tanium-managed dashboards, but you can assign them to a different content set to limit access and you can add labels (see Edit dashboards on page 103). You can also clone a dashboard and edit the clone (see Clone dashboards on page 102).

Example of Tanium-managed dashboard

Asset Discovery and Inventory is an example of a Tanium-managed dashboard that appears by default on the Tanium Reporting **Home** page. The metrics and charts on the dashboard help you to quickly assess and visualize basic platform and software inventory details for the endpoints in your environment. After you initially deploy Tanium, your operations and security teams can use the dashboard to address questions such as:

- How many managed endpoints does your environment have for each OS type? Based on these metrics, you might request an increase in the maximum number of managed endpoints in your Tanium license.
- Which applications are most commonly used or unused on endpoints? Based on these metrics, you can use Tanium™ Deploy to configure deployments for installing, updating, or uninstalling software.

Example of the Asset Discovery and Inventory dashboard

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To create a version of the **Asset Discovery and Inventory** dashboard with different charts or filters, you can click **Clone**, edit the clone settings, and save it as a custom dashboard with a new name.

Emerging issue dashboards

An *emerging issue dashboard* provides details for a specific vulnerability, including the latest information about the threat and customized information about the potential exposure based on real-time telemetry of your environment. Emerging issue dashboards contain the following sections:

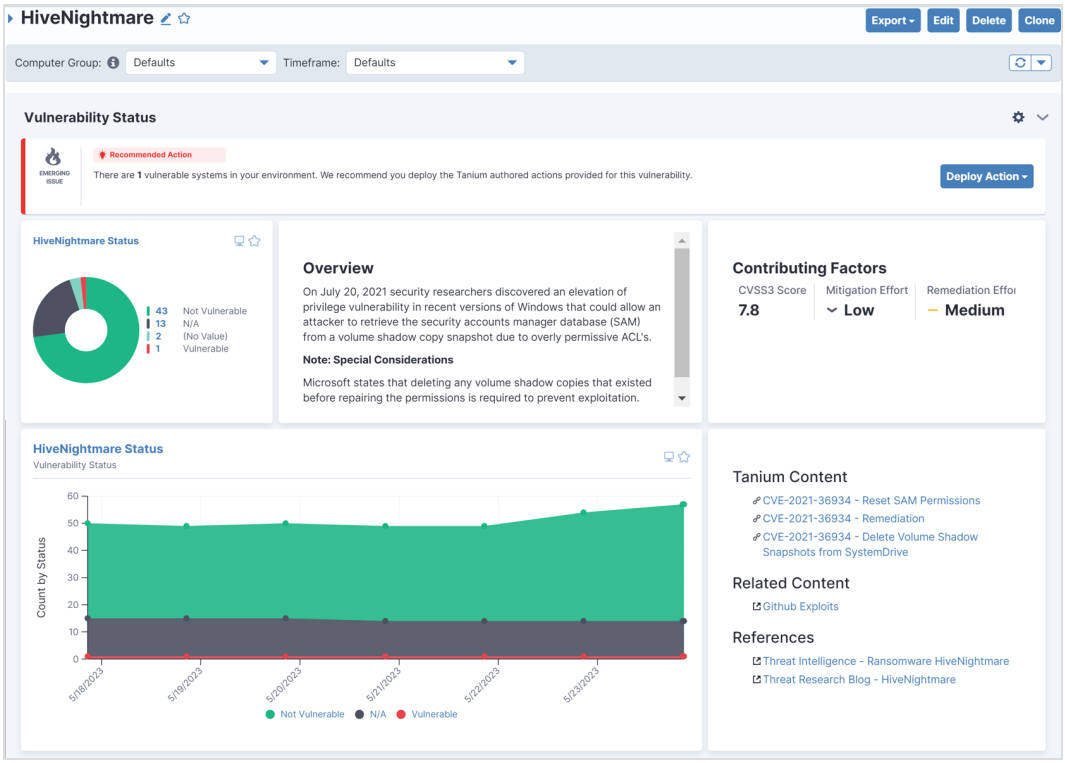
- **Overview and Contributing Factors**: Highlights of the latest industry information and Tanium insights on the vulnerability.
- **Status**: Current and temporal view of endpoints that are vulnerable, not vulnerable, or not applicable to the emerging issue.
- **Tanium/Related Content and References**: Consolidated research and packages from reputable sources for reference and assessment.
- **Deploy Action**: If applicable mitigation or remediation steps are available, you can pivot directly to deploying packages that Tanium has developed to help you lower your risk profile through targeted actions against vulnerable endpoints.

Tanium-managed dashboards include several emerging issue dashboards that you can open directly from the Reporting workbench (see View dashboards on page 92) or from Tanium™ Guardian notifications (see Tanium™ Feed User Guide: View notifications). For more information about these dashboards, see Tanium Community article: Introducing Tanium Alerts and Recommendations for Critical Vulnerabilities (registration is required).

The content-only solution Tanium™ Emerging Issues Content contains the content for all Tanium-managed dashboards, reports, sensors, and packages that help you identify and mitigate emerging issues. Tanium includes updated versions of the solution in Tanium release bundles (semiannual releases or maintenance release updates) and also between Tanium releases. To import or update Emerging Issues Content, see Tanium Console User Guide: Managing solutions.

The following example of an emerging issue dashboard addresses the HiveNightmare vulnerability:

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Supported languages

You can select one of the languages in the following table for user interface (UI) text in the Reporting workbench and Tanium documentation. The language that you select for the workbench also sets the date and time format:

- **Dates**: In the table, the letters `dd`, `mm`, and `yyyy` represent the digits for day, month, and year respectively.
- **Times**: English (United States) times use the 12-hour clock in the format `hh:mm:ss [AM|PM] <time zone>`, where `hh`, `mm`, and `ss` represent the hour, minute, and second respectively. Other times use the 24-hour clock, where `GMT-<#>` indicates the offset from Greenwich Mean Time (GMT). For example, `GMT-7` indicates a time zone that is 7 hours ahead of GMT.

Supported languages with associated date and time formats

Language	Locale code	Date and time format
English (United States)	en-US	mm/dd/yyyy [AM|PM] *<time zone>*
French (France)	fr-FR	dd/mm/yyyy GMT-<#>
German (Germany)	de-DE	dd/mm/yyyy GMT-<#>
Japanese (Japan)	ja-JP	yyyy/mm/dd GMT-<#>
Korean (Korea, Republic of)	ko-KR	yyyy.mm.dd GMT-<#>

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Supported languages with associated date and time formats (continued)

Language	Locale code	Date and time format
Spanish (Latin American)	es-LA	dd/mm/yyyy GMT-<#>

For information about language support, which types of text are translated, and the steps to select a language, see Tanium Console User Guide: Reference: Language support.

Interoperability with other Tanium products

Reporting works with other Tanium solutions for additional reporting of related data.

Comply

Reporting works with Tanium™ Comply to populate the **Risk & Compliance** tab of the Endpoint Details page. For more information, see Risk & Compliance on page 150.

Connect

Configure a Tanium™ Connect destination to export reports outside of Tanium. For more information, see Export reports through Tanium Connect on page 79.

Deploy

Reporting works with Tanium™ Deploy to populate the **Software Package Applicability** and **Maintenance Windows** panels in the **Endpoint Management** tab of the Endpoint Details page. For more information, see Endpoint Management on page 149.

Direct Connect

Tanium™ Direct Connect enables Screen Sharing sessions and other features on the Endpoint Details page. For more information, see Open Screen Sharing sessions on page 160 and Direct Connect on page 147.

Engage

Reporting works with Tanium™ Engage to populate the **Engage** tab on the Endpoint Details page. For more information, see Engage on page 150.

Gateway

You can use Tanium™ Gateway to:

- **Filter reports**: You can filter reports based on their name, description, author (creator), content set, creation date/time, labels, and associated Tanium solution. For more information, see Reporting query filter syntax on page 190.
- **Retrieve, export, or import reports**: For more information, see Reference: Gateway examples for Reporting on page 190.

For more information about features that are available through Gateway, see Tanium Gateway User Guide: Schema reference.

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Guide

Tanium™ Guide can generate custom alert notifications for chart panels in Reporting dashboards, which alert users when a threshold condition is met. For more information, see Configure and manage custom alerts on page 124 and Tanium Guide User Guide: Notifications.

Interact

Reporting works with Tanium™ Interact to provide the following features:

- **Endpoint details**: If you use Interact to issue a dynamic or saved question that includes certain sensors, you can see comprehensive details about any single endpoint that returns results by opening the Endpoint Details page in Reporting. For more information, see Access endpoint details from the Question Results page on page 145.
- **Drill down questions**: After you open a report, you can issue a question in Interact that drills down into report results. For more information, see Explore report data in Interact on page 84.
- **Action deployment**: After you open a report, you can deploy an action to endpoints that return report results. For more information, see Deploy actions or run playbooks on page 86.
- **TDS**: Interact includes TDS, which collects and stores the data that Reporting uses in reports. For more information, see Data sources on page 13.

Investigate

Reporting works with Tanium™ Investigate to provide the following features through the Endpoint Details page:

- **Investigate** tab: Add endpoint activities to a new or existing investigation and then manage that investigation in Investigate. For more information, see Investigate on page 149.
- **Remote Management** tab: View information about the processes on an endpoint and terminate processes if necessary. For more information, see Remote Management on page 149.
- **File Browser** button: View and manage files and directories on the endpoint. For more information, see Browse and manage endpoint file systems on page 161.

Patch

Reporting works with Tanium™ Patch to populate the **OS Patch Applicability** and **Maintenance Windows** panels in the **Endpoint Management** tab of the Endpoint Details page. For more information, see Endpoint Management on page 149.

Performance

Reporting works with Tanium™ Performance to populate the **Resource Summary** panel in the **Remote Management** tab of the Endpoint Details page. For more information, see Remote Management on page 149.

Provision

Reporting works with Tanium™ Provision to deploy actions that relate to retiring and locking devices. For more information, see Tanium Provision User Guide: Retiring and locking devices.

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Getting started with Reporting

Follow these steps to configure and use Reporting.

Step 1: Review Reporting requirements

Review the system, network, security, and user role requirements for Reporting. For more information, see Reporting requirements on page 30.

Step 2: Install and configure Reporting

Install Reporting along with any dependent solutions, set up Reporting users, and select the computer groups from which Reporting collects data. For more information, see Installing Reporting on page 44 and Configuring Reporting on page 46.

Step 3: Explore Tanium-managed reports and dashboards

Reporting contains predefined reports and dashboards to help you get started on common activities in a Tanium deployment. For more information, see Tanium-managed reports on page 16 and Tanium-managed dashboards on page 22.

Step 4: Register sensors with Tanium Data Service (TDS)

Reporting uses data that TDS collects from endpoints through registered sensors. To see which sensors are registered and to register additional sensors, see Tanium Interact User Guide: Managing Tanium Data Service (TDS).

Step 5: Create reports

Create custom reports for scenarios that are specific to your environment. For more information, see Working with Reporting reports on page 48.

Step 6: Explore and manage endpoints

From the **Explore Data** page and Endpoint Details page, you can perform advanced exploration and management of endpoints. For example, you can issue drill-down questions in Tanium Interact, deploy actions, and manage endpoint file systems. For more information, see Explore data and manage endpoints on page 74 (**Explore Data** page) and Working with a single endpoint on page 143 (Endpoint Details page).

Step 7: Create dashboards

Create dashboards for scenarios that are specific to your environment. For more information, see Working with Reporting dashboards on page 92.

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Reporting requirements

Review the requirements before you install and use Reporting.

Core platform dependencies

Make sure that your environment meets the following requirements:

- Tanium license that includes Reporting. For more information about how to get Reporting, see Tanium Solutions & Bundles.
- Tanium™ Core Platform servers

Solution dependencies

Other Tanium solutions are required for Reporting to function (required dependencies) or for specific Reporting 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 Reporting dependencies have their own dependencies, which you can see by clicking the links in the lists of Required dependencies on page 30 and Feature-specific dependencies on page 31. Note that the links open the user guides for the latest version of each solution, not necessarily the minimum version that Reporting requires.

Tanium recommended installation

If you select **Tanium Recommended Installation** when you import Reporting, 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 Reporting 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 Reporting, the Server automatically updates those dependencies to the latest available versions.

Required dependencies

Reporting has the following required dependencies:

- Tanium™ Core Content
  Core Content™ requires Tanium™ Client Management
- Tanium™ Default Computer Groups
- Tanium™ Default Content

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- Tanium™ Reporting Content
- Tanium™ Blob Service
- Tanium™ Interact
- Tanium™ Data Service (TDS)
- Tanium™ RDB Service

Feature-specific dependencies

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

- Tanium™ Asset to view applicable content in Tanium-managed dashboards and reports
- Tanium™ Benchmark to view applicable content in Tanium-managed dashboard and reports
- Tanium™ Comply:
    - To view applicable content in Tanium-managed dashboards and reports
    - To view the **Risk & Compliance** tab on the Endpoint Details page
- Tanium™ Connect to create connections with reports as the data source
- Tanium™ Deploy:
    - To view applicable content in Tanium-managed dashboards and reports
    - To view all applicable content on the **Endpoint Management** tab of the Endpoint Details page
- Tanium™ Direct Connect
    - To enable the **Open Screen Sharing Session** button on the Endpoint Details page
    - To enable Tanium Investigate features on the Endpoint Details page
- Tanium™ Engage to view the **Engage** tab on the Endpoint Details page
- Tanium™ Emerging Issues Content to see emerging issue dashboards that Tanium provides.
- Tanium™ Guide
- Tanium™ Interact to purge endpoint data that Tanium Data Service (TDS) stores
- Tanium™ Data Service (TDS) to purge endpoint data that Tanium Data Service (TDS) stores
- Tanium™ Investigate:
    - To access the associated features on the Endpoint Details page: **Investigate** tab, **Remote Management** tab, **Windows Events** tab, and **File Browser** button.
    - To enable the **Service Control** panel on the **Remote Management** tab.
    - To enable the **Browse & Edit Windows Registry** panel on the **Remote Management** tab.

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- Tanium™ Patch:
    - To view applicable content in Tanium-managed dashboard and reports
    - To deploy patches from a report
    - To view all applicable content on the **Endpoint Management** tab of the Endpoint Details page
- Tanium™ Performance to view the **Resource Summary** panel on the **Remote Management** tab of the Endpoint Details page
- Tanium™ Provision to deploy actions related to retiring and locking devices.
- Tanium™ Screen Sharing to open Screen Sharing sessions

If you install feature-specific dependencies that provide content for Tanium-managed dashboards and reports after you install Reporting, Reporting periodically checks for dependencies and collects data when the dependencies are present. To force Reporting to check for new dependencies, you can restart the Reporting service.

Tanium™ Module Server

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

Endpoints

Reporting does not deploy packages or endpoint tooling to endpoints. For Tanium Client operating system support, see Tanium Client Management User Guide: Client version and operating system requirements.

Host and network security requirements

Specific ports and processes are needed to run Reporting.

Ports

The following ports are required for Reporting communication.

Port requirements

Source	Destination	Port	Protocol	Purpose
Module Server	Module Server (loopback)	17524	TCP	Internal purposes; not externally accessible

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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.

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.

Reporting security exclusions for Tanium Core Platform servers (Windows deployment only)

Target Device	Notes	Exclusion Type	Exclusion
Module Server		Process	`<Module Server>\services\reporting-service\TaniumReportingService.exe`

User role requirements

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

- Reporting solution permissions on page 34
- Reporting administration and platform content permissions on page 37: The solution permissions automatically provide some of these permissions.
- Permissions for Endpoint Details page on page 37

To review a summary of the predefined roles, see Set up Reporting users on page 46.

Some Reporting 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 Reporting. If you create custom roles for Reporting users, be sure to assign all the solution permissions and content set permissions that are required for Reporting 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:

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

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

Reporting solution permissions

Permission	Reporting Operator[1]	Reporting User[1]	Reporting Viewer[1]
Dashboard READ: View dashboards, export dashboards, assign or unassign favorite status for dashboards, and deploy actions from dashboard panels (for additional permissions that are required to deploy actions, see Tanium Console User Guide: Deploy actions). View tabs on the Endpoint Details page. WRITE: Create, edit, import, and delete dashboards. Create, edit, and delete custom tabs on the Endpoint Details page. For the full list of Tanium solutions and permissions that are required to use the Endpoint Details page, see Permissions for Endpoint Details page on page 37. **NOTE** The Reporting **Dashboard** permissions are not interchangeable with the Platform Content **Dashboard** permissions, which are for Interact dashboards.	✓ READ WRITE	✓ READ WRITE	✓ READ
Managed Dashboard For internal purposes only.	✗	✗	✗
Managed Report For internal purposes only.	✗	✗	✗

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Reporting solution permissions (continued)

Permission	Reporting Operator[1]	Reporting User[1]	Reporting Viewer[1]
Report READ: View reports, export reports, assign or unassign favorite status for reports, and deploy actions or drill down in Interact from reports. Deploying actions and drilling down in Interact require additional permissions, as described in Role permissions for deploying actions on page 86 and Working with Reporting reports on page 48. WRITE: Create, edit, import, and delete reports	✓ READ WRITE	✓ READ WRITE	✓ READ
Report API API access to Reporting and TDS NOTE: Note: The **Report API user** permission is required to use Reporting through the API and Tanium Console.	✓ USER	✓ USER	✓ USER
Reporting For internal purposes only	✗	✗	✗
Reporting Alert READ: View threshold-based alerts WRITE: Create, edit, and delete threshold-based alerts	✓ READ WRITE	✓ READ WRITE	✓ READ
Reporting Category READ: View, assign, and unassign labels for reports and dashboards. Add or remove labels from the favorites list. WRITE: Create, edit, and delete labels for reports and dashboards.	✓ READ WRITE	✓ READ WRITE	✓ READ
Reporting Feed Message Read and acknowledge Tanium™ Guide messages	✓ ACKNOWLEDGE	✓ ACKNOWLEDGE	✓ ACKNOWLEDGE
Reporting Groups Select the computer groups from which Reporting collects data for charts and dashboards	✓ CONFIGURE	✗	✗

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Reporting solution permissions (continued)

Permission	Reporting Operator[1]	Reporting User[1]	Reporting Viewer[1]
Reporting Historical Sources READ: View historical data sources WRITE: Enable or disable historical data sources and run collections	✓ READ WRITE	✗	✗
Reporting Metrics Source READ: View Module sources on page 14 that are in the content sets to which you apply this permission. Users require this permission to select a module source as the data source for a dashboard chart. WRITE: For internal purposes only	✓ READ	✓ READ	✓ READ
Reporting Managed Alert For internal purposes only	✗	✗	✗
Reporting Pipeline Run and read pipeline data from TDS	✗	✗	✗
Reporting Service Account For internal purposes only	✗	✗	✗
Reporting Service Account All Content For internal purposes only	✗	✗	✗
Reporting Settings READ: View Reporting settings WRITE: Update Reporting settings	✓ READ WRITE	✓ READ	✓ READ
Reporting System Alert For internal purposes only	✗	✗	✗
System Dashboard For internal purposes only	✗	✗	✗

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Reporting solution permissions (continued)

Permission	Reporting Operator[1]	Reporting User[1]	Reporting Viewer[1]
System Report For internal purposes only	✗	✗	✗
Template Dashboard For internal purposes only	✗	✗	✗
Template Report For internal purposes only	✗	✗	✗

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.

Reporting administration and platform content permissions

Permission	Reporting Operator	Reporting User	Reporting Viewer
Filter Group	✓ READ	✓ READ	✓ READ
Plugin	✓ EXECUTE READ	✓ EXECUTE READ	✓ EXECUTE READ
Sensor	✓ READ	✓ READ	✓ READ

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

Permissions for Endpoint Details page

The following table lists the Tanium solutions and role permissions that are required to access features on the Endpoint Details page, and lists the system (Tanium-defined) module roles that provide the permissions. The **Administrator** reserved role is not listed but provides all the permissions.

NOTE

If you do not have permission to access specific content on the Endpoint Details tabs, you might see **No Results** in affected panels.

If you do not have RBAC permissions to use a particular sensor, the fields that the sensor provides on the page do not contain data.

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Permissions for Endpoint Details page

Feature	Solutions	Permissions	Module roles
Endpoint Details page access[1] **Endpoint Overview** tab Custom tabs	Reporting (any version)	• **Dashboard[2] read**: View the Endpoint Details page, **Endpoint Overview** tab, and custom tabs. • **Dashboard[2] write**: Create, edit, and delete custom tabs. Edit content set assignments for Tanium-managed tabs.	The following roles provide **Dashboard read** and **write** permissions: • Reporting Operator • Reporting User The following roles provide **Dashboard read** permission: • Reporting Viewer • Interact Power User • Interact Basic User For the full list of permissions that the Reporting roles provide, see Reporting solution permissions on page 34. For the full list of permissions that the Interact roles provide, see Tanium Interact User Guide: User role requirements.
File Browser button	Direct Connect 2.7.40 or later Investigate (any version)	All the following permissions are required to use the **File Browser** for viewing an endpoint file system and exporting files or directories from an endpoint: • **Direct Connect File read** • **Direct Connect Must Gather read** • **Investigate Direct Connect read** • **Investigate Remote Management show** In addition to the preceding permissions, **Direct Connect File write** permission is required to use the **File Browser** for deleting files or directories on an endpoint.	For the list of roles that provide Direct Connect permissions and for details about the permissions, see Tanium Direct Connect User Guide: User role requirements. For the list of roles that provide the Investigate permissions and for details about the permissions, see Tanium Investigate User Guide: User role requirements.

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Permissions for Endpoint Details page (continued)

Feature	Solutions	Permissions	Module roles
Open Screen Sharing Session button	Direct Connect 2.7.40 or later Screen Sharing (any version)	All the following permissions are required to enable screen sharing features: • **Screen Sharing Config read** • **Screen Sharing Console execute** • **Screen Sharing Platform Integration User account** • **Screen Sharing Settings read** • **Screen Sharing Support Session read**, **write**, **execute**, **delete** • **Screen Sharing Support Session Options read** • **Screen Sharing TDS Integration User account**	For the list of roles that provide these permissions and for details about the permissions, see Tanium Direct Connect User Guide: User role requirements.
Direct Connect button	Direct Connect 2.7.40 or later	**Direct Connect Session write**: Establish and end direct connections.	For the list of roles that provide this permission and for details about the permission, see Tanium Direct Connect User Guide: User role requirements.
Deploy Action button	Interact 2.13 or later: Required for all actions IR Quarantine (any version): Required for actions related to quarantining endpoints Provision 1.8 or later: Required for actions related to retiring and locking devices	**Interact Execute action**: Enable action deployment.	Interact Power User For the full list of permissions that this role provides, see Tanium Interact User Guide: User role requirements.

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Permissions for Endpoint Details page (continued)

Feature	Solutions	Permissions	Module roles
Endpoint Management tab	Deploy 2.18.67 or later: Enables the **Software Package Applicability** panel Patch 3.13.47 or later: Enables the **OS Patch Applicability** panel	The following permissions are required to view Deploy content in the **Endpoint Management** tab. • **Deploy Maintenance Window read** permission is required to view Deploy content in the **Maintenance Windows** panel. • **Deploy Deployment read** permission is required to view the **Software Package Applicability** panel. • **Deploy Deployment write** permission is required to perform actions in the **Software Package Applicability** panel, such as installing, updating, or removing packages. **Patch Maintenance Window read** permission is required to view Patch content in the **Maintenance Windows** panel. All the following permissions are required to view the **OS Patch Scan** panel: • **Patch Scan Configuration read** • **Plugin execute** permission on the **Patch Content** Set. This is a Platform Content permission. • **Sensor read** permission on the **Patch Service Objects** content set. This is a **Platform Content** permission.	For the roles that provide Deploy permissions and for details about the permissions, see Tanium Deploy User Guide: User role requirements. For the roles that provide Patch permissions and for details about the permissions, see Tanium Patch User Guide: User role requirements.
Engage tab	Engage 1.1.117	All the following permissions are required to view the **Engage** tab: • **Engage show** • **Engage Surveys read**	For the list of roles that provide Engage permissions and for details about the permissions, see Tanium Engage User Guide: User role requirements.

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Permissions for Endpoint Details page (continued)

Feature	Solutions	Permissions	Module roles
Investigate tab	Investigate (any version) Direct Connect 2.7.40 or later	All the following permissions are required to view the **Investigate** tab: • **Investigate Direct Connect read** • **Investigate show**	For the list of roles that provide Investigate permissions and for details about the permissions, see Tanium Investigate User Guide: User role requirements.
Risk & Compliance tab	Comply 2.16.53 or later	**Comply Investigation execute**: Enable the **Risk & Compliance** tab.	For the list of roles that provide the **Comply Investigation** permission and for details about the permission, see Tanium Comply User Guide: User role requirements.
Client Health tab	Direct Connect 2.7.40 or later	• **Direct Connect show**: Enable the **Client Health** tab. • **Direct Connect Must Gather read**: Collect troubleshooting information through the **Gather** panel in the **Client Health** tab. • **Direct Connect File read**: View and download logs from the Tanium Client.	For the list of roles that provide these permissions and for details about the permissions, see Tanium Direct Connect User Guide: User role requirements.

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Permissions for Endpoint Details page (continued)

Feature	Solutions	Permissions	Module roles
Remote Management tab	Direct Connect 2.7.40 or later Investigate: Enables the following panels: • **Live Process Monitor** (any version) • **Service Control** (1.0.172 or later) • **Browse & Edit Windows Registry** 2.10.15 or later Performance 1.13.229 or later: Enables the **Resource Summary** panel	All the following permissions are required to view the **Remote Management** tab: • **Direct Connect Must Gather read** • **Investigate Direct Connect read** • **Investigate Remote Management show** The following permissions are required to view and manage registry values in the **Browse & Edit Windows Registry** panel. • **Direct Connect Registry read** permission is required to view registry values. • **Direct Connect Registry write** permission is required to create, edit, and delete registry values. **Direct Connect Terminate process** permission is required to terminate processes in the **Live Process Monitor** panel. **Performance Direct Connect read** permission is required to view the **Resource Summary** panel. The following permissions are required to view, start, stop, or restart services on the **Service Control** panel: • **Direct Connect Session read**: View services. • **Investigate show**: View services. • **Direct Connect Service State write**: Start, stop, or restart services.	For the list of roles that provide Direct Connect permissions and for details about the permissions, see Tanium Direct Connect User Guide: User role requirements. For the list of roles that provide the Investigate permissions and for details about the permissions, see Tanium Investigate User Guide: User role requirements. For the list of roles that provide the **Performance Direct Connect** permission and for details about the permission, see Tanium Performance User Guide: User role requirements.

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Permissions for Endpoint Details page (continued)

Feature	Solutions	Permissions	Module roles
Windows Events tab	Direct Connect 2.7.40 or later Investigate 1.0.170 or later	All the following permissions are required to view the **Windows Events** tab: • **Direct Connect Must Gather read** • **Investigate Direct Connect read** • **Reporting Saved Query read**: Enables viewing event subscriptions • **Reporting Saved Query write**: Enables managing event subscriptions	For the list of roles that provide the **Direct Connect Must Gather** permission and for details about the permission, see Tanium Direct Connect User Guide: User role requirements. For the list of roles that provide the Investigate permissions and for details about the permissions, see Tanium Investigate User Guide: User role requirements.

[1] These permissions are for accessing the Endpoint Details page from within the Reporting workbench. Certain other solutions also provide access, but only if they are at a version that supports the Endpoint Details page, as listed under Feature-specific dependencies on page 31.

[2] Grants access to content in the Reporting content set. Note that Reporting **Dashboard** permissions are not interchangeable with Platform Content **Dashboard** permissions, which are for Interact dashboards.

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Installing Reporting

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

- **Automatic configuration**: Reporting is installed with any required dependencies and other selected products. This option is the best practice for most deployments. For more information about the automatic configuration for Reporting, see Tanium Console User Guide: Import all modules and services.
- **Manual configuration**: Manually install Reporting and the required dependencies. For more information, see Import Reporting on page 44.

Before you begin

- Read the Release notes.
- Review the Reporting requirements on page 30.
- Assign the correct roles to users for Reporting. Review the User role requirements on page 33.
    - To import the Reporting solution, you must be assigned the **Administrator** reserved role.

Import Reporting

Perform the following steps to install the Reporting solution on the Tanium Server.



If you have multiple Tanium Servers in an active-active configuration, you need to perform these steps on only one Tanium Server.

1. Sign in to Tanium Console with an account that has the **Administrator** reserved role.
2. From the Main menu, go to **Administration > Configuration > Solutions**.
3. Go to the **Content** section, select the checkbox for **Reporting**, and click **Install**.



Depending on the Tanium Core Platform and Tanium Console versions, you might have to manually install Reporting dependencies also. For more information, see Solution dependencies on page 30. If you need to install any prerequisite Tanium solutions or content, select the corresponding checkboxes for those solutions.

4. Review the content to import and click **Begin Import**.

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Manage solution dependencies

Other Tanium solutions are required for Reporting to function (required dependencies) or for specific Reporting features to work (feature-specific dependencies). For more information, see Solution dependencies on page 30.

Upgrade Reporting

For more information about upgrading Reporting, see Tanium Console User Guide: Install a Tanium release update. After the upgrade, verify that the correct version is installed. For more information, see Verify Reporting version on page 45.

Verify Reporting version

After you import or upgrade Reporting, verify that the correct version is installed.

1. Refresh your browser.
2. From the Main menu, go to **Administration > Solutions**.
3. Go to the **Content** section and, in the **Reporting** row, verify the **Imported Version** reflects the version you installed.
4. From the Main menu, go to **Data > Explore Data**, and verify that the page loads.

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Configuring Reporting

Set up Reporting users

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

For more information about permissions for each role, see User role requirements on page 33.

IMPORTANT

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

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

Reporting Operator

Assign the **Reporting Operator** role to users who manage the configuration of Reporting.

Reporting User

Assign the **Reporting User** role to users who view and edit reports.

NOTE

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

Select computer groups for data collection

Reporting collects data every 24 hours to enable dashboard charts to show historical data. Reporting collects the data only from endpoints in computer groups that you select for collection. Furthermore, only selected computer groups are available to use as dashboard filters. After you select computer groups, Reporting collects data from them in the next collection cycle. Reporting runs each source collection for each computer group. Reporting limits the number of selected computer groups to 100 to avoid slower collection runs and potentially delayed collections. If you deselect computer groups, Reporting stops collecting data from them. For more information, see Overview of historical data collection for report-based charts on page 137, Computer Group on page 98, and Chart data sources on page 137.

NOTE

Users require a role with the **Reporting Groups configure** permission to view the **Data > Settings** page and to select or deselect computer groups. You can select or deselect only the computer groups that are assigned to your user account or persona. Reporting can collect data only from computer management groups that have filtering enabled. For more information about how to configure, assign, or otherwise manage computer groups, see Tanium Console User Guide: Managing computer groups.

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Reporting selects the following computer groups for collection by default:

- All Computers
- All Linux
- All Mac
- All Servers
- All Windows
- All Windows Servers
- All Windows Workstations
- All Workstations

Perform the following steps to select or deselect computer groups for data collection:

1. From the Main menu, go to **Data > Settings > Configuration**.
2. Click **Select Computer Groups**, select or deselect computer groups, and click **Save**.



If the list of computer groups is long, use the **Filter by Name** field to find specific computer groups.
You cannot select the reserved **No Computer** computer group. To hide it from the list, set the **Show** toggle to **Available**.

Select a language

Select one of the supported languages for the Reporting workbench and Reporting user guide, as described in Tanium Console User Guide: Reference: Language support.

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Working with Reporting reports

Reporting provides an **Explore Data** page for creating views of Tanium Client managed endpoint data in grid format. You can filter the data, configure charts to visualize the data, and save the views as custom reports for sharing with other users and providing source data to dashboards. The **Explore Data** page, custom reports, and Tanium-managed reports provide options to drill down into endpoint data and manage endpoints through action deployment.

For example, you can create a report that tracks the status of a particular vulnerability on endpoints and deploy a remediative action from the report. You can also use the report as the source for a dashboard chart that enables users to understand the vulnerability status at a glance.

For more information about reports, including Tanium-managed reports and flattening report data, see Reports on page 15.

NOTE

Report read permission is required to view reports, export reports, assign or unassign favorite status for reports, and deploy actions or drill down in Interact from reports. **Report write** permission is required to create, edit, import, and delete reports. For more information about the predefined roles that have these permissions, see Reporting solution permissions on page 34.

View reports

Perform the following steps to open a report. You can access only reports that are in content sets for which you have **Report read** permission.

1. From the Main menu, go to **Data > Reports**.
   The **Reports** page lists all the reports that you have permissions to access.

   NOTE

   The page shows basic settings for each report, such as the **Report Name** and **Content Set**. If a report has a description, labels, and associated dashboards, click Expand beside the **Report Name** to see these additional settings. To see the additional settings for all reports, click Expand in the column heading. Associated dashboards are dashboards that use the report as the source for a chart panel (see Chart data sources on page 137) or action panel (see Message on page 119). For more information about other basic settings, see Report settings on page 74.

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2. (Optional) Use the following filter options to facilitate finding specific reports if the grid is long. The grid shows only the reports that match all the filters that you specify.

Report filter options

Filter by	Description
Labels	Select **Labels** to show only the reports to which those labels are assigned. TIP You can also use the **Labels** panel to add, edit, or delete labels. For more information, see Managing labels on page 165.
Favorites 	Use the **Show** buttons to toggle between showing **All** reports or only reports that are in your favorites list . TIP Click  beside a report name to add the report to your favorites list or click  to remove the report from your favorites list.
Content set	Select a content set to show only the reports that are assigned to that set.
Author (creator)	Select a user name to show only the reports that the user created or select one of the **Tanium Managed** options to show only the predefined reports that Tanium provides (see Tanium-managed reports on page 16).
Creation date 	Specify a range of report creation dates by clicking the **Created on** and **to** calendar widgets .
Text (name or description) 	Enter an alphanumeric string in the **Search by text...**  field to match all or part of a report name or description.

3. Click a **Report Name** to open that report. You can then configure the report filters, customize the report presentation, explore endpoint data, and manage endpoints, as described in Use a report or the Explore Data page on page 50.

NOTE To distinguish among reports that have the same name, see Identify reports that have duplicate names on page 49.

Identify reports that have duplicate names

A Tanium environment might have multiple reports with the same name. This might happen if you Import reports on page 80 from another environment. Use the following attributes to distinguish among reports that have the same name:

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- **Author**: Reports with the same name often have different authors (creators). To see the author of a report, go to the **Data > Reports** page and check the **Author** column. Alternatively, you can open a report and click Expand beside the report name to view its basic settings.
- **Report ID**: Each report has a unique ID. To see the ID, open a report and check the URL field in your browser for the `id` value, such as: `https://example.com/ui/reporting/reports/report?id=`**`fce5f7e7-09d4-4142-90da-86b73b04682b`**.

Use a report or the Explore Data page

After you open a report or Add source data on page 64 in the **Explore Data** page, you can perform the tasks listed in Using a report or the Explore Data page on page 50 using the widgets described in Report and Explore Data widgets on page 53.

Using a report or the Explore Data page

Task	Options
Filter data	If you configure multiple filters, the report or **Explore Data** page shows only the data that matches all the filters. Reporting filters first by basic filters (**Filter Group**, **Endpoint Last Seen**, and **OS**) and then by advanced filters (**Filters** section). Use the following widgets to filter data: • Filters (advanced) on page 55 • Filter Group on page 56 • Endpoint Last Seen on page 56 • OS on page 56 • OR/AND on page 56 • Clear Filters on page 56 • Chart result filter on page 57 (click inside chart) • Filter items on page 58 (text string filter) • Filter by Count on page 60 • Filter by cell value on page 60 NOTE The cumulative limit for all basic and advanced filters is 500 per report.

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Using a report or the Explore Data page (continued)

Task	Options
Edit data presentation	A custom report enters edit mode when you change presentation options that are not saved automatically. After you finish making changes in edit mode, you can **Save** your changes or **Revert** to the last saved version of the report. You can change presentation options while viewing a Tanium-managed report, but you cannot save the changes. Use the following widgets to control how the **Explore Data** page or a report presents data: • Refresh on page 57  • Manage visualizations on page 57  • Customize columns on page 58  • Customize column names on page 58  • Resize columns on page 61  • Sort grid rows on page 58  • See all on page 60
Manage a report	Use the following widgets to manage a report: •  <Report name> on page 53   (basic report settings and favorite status) • Save As on page 53 (clone the report) • Edit Data on page 54 • Manage recommended actions on page 57 • Export (JSON format) on page 53 • Export (CSV format) on page 57  • View source details on page 59  • Delete on page 54
Manage contents of Explore Data page	Use the following widgets to manage which data the **Explore Data** page shows or to save the current view as a report: • Clear All on page 53 (remove all data sources) • Save Report on page 53 (save the current **Explore Data** view as a report) • New Report on page 54 (open a fresh **Explore Data** page) • Source Data on page 54 pane (add or remove sources) • View source details on page 59 

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Using a report or the Explore Data page (continued)

Task	Options
Drill down into data	Use the following widgets to further explore the data that endpoints provide to the **Explore Data** page or a report: • Drill Down in Interact on page 57 • Work with drill-down reports on page 88 • View endpoint details on page 59 
Manage endpoints and endpoint data	Use the following widgets to manage endpoints and the data they provide to the **Explore Data** page or a report: • Actions on page 57 • Purge endpoint data on page 57 • Copy cell contents on page 60 

The following table lists the widgets in reports and the **Explore Data** page in top-to-bottom and left-to-right order.

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Report and Explore Data widgets

Widget	Description
<Report name> 	This section appears only in existing reports, not in unsaved views that you construct in the **Explore Data** page. You can perform the following tasks: • **View settings**: Click Expand beside the report name to show the following report settings. You cannot save the expanded view of the settings; the next time you open the report, the settings are hidden (collapsed). ◦ **Description**, if the report has one. ◦ **Content Set** assignment. ◦ **Auditing information**, such as who created the report (**Author**), who last modified the report, and when. ◦ **Dashboards** that use the report for chart panels or action panels. Each dashboard name is a link that opens the dashboard. ◦ **Labels** assignments. Each label name is a link that opens the **Reports** page with the label selected as a filter in the **Labels** section. • **Edit settings**: Click Edit beside the report name to edit the name, description, content set assignment, or label assignments. For more information about these settings, see Report settings on page 74. NOTE For **Tanium Managed** reports, the only allowed edits are assigning a different content set and adding labels. • **Assign favorites**: Click the favorite toggle beside the report name to include the report in the favorites list or exclude it from the list. To filter the **Data > Reports** page to show only your favorite reports, see Favorites on page 49.
Clear All	This button appears only on the **Explore Data** page. It reverts the page to the original, unconfigured view by removing all the selected data sources.
Save Report	This button appears only on the **Explore Data** page. It prompts you to save the current view as a report by configuring the basic report settings. For more information, see Report settings on page 74.
Export (JSON format)	This button appears only in existing reports. It exports the report as a JSON file to the downloads folder of your local browser. For more information, see Export reports in JSON format on page 78. To import report configurations from a JSON file into another Tanium Server, see Import reports on page 80.
Save As	This button appears only in existing reports. It prompts you to save the basic settings with a new name to create a clone of the report. For more information, see Clone reports on page 74.

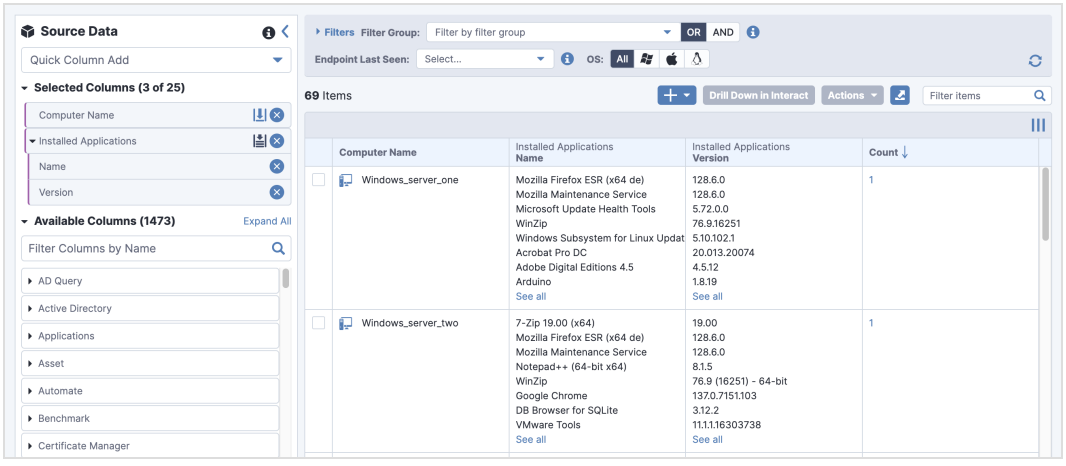
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Report and Explore Data widgets (continued)

Widget	Description
Edit Data	This button appears only for custom reports that are in a content set for which you have **Report write** permission. To edit other reports, see Explore data on page 54. Click **Edit Data** to change the data sources and chart that the report includes.
Delete	This button appears only for custom reports that are in a content set for which you have **Report write** permission. It deletes the current report. For more information, see Delete reports on page 91.
Explore data	This button appears only in existing reports. It opens the **Explore Data** page with all the report settings applied. You can then modify the settings to add, remove, or filter data without altering the original report. You can save the modified settings as a new report if you have **Report write** permission for one or more content sets (see Explore data and create reports on page 63). The **Explore Data** button appears only for reports that match one of the following conditions: • The report is in a content set for which you have **Report read** permission but not **write** permission. • The report is Tanium managed. To edit custom reports that are in content sets for which you have **Report write** permission, see Edit Data on page 54.
New Report	This button appears only in existing reports. It opens the **Explore Data** page with no sources selected. For more information, see Explore data and create reports on page 63.
Source Data	This pane appears only on the **Explore Data** page or a report in edit mode. Use the pane to Manage source data for a report on page 65.

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Report and Explore Data widgets (continued)

Widget	Description
Filters (advanced)	Configure advanced filters based on data source conditions. If necessary, you can configure nested filters. NOTE The OR/AND on page 56 option in the toolbar for basic filters (Filter Group on page 56, Endpoint Last Seen on page 56, and OS on page 56) does not apply to advanced filters. Use the **AND**/**OR** toggles within the advanced filter fields to specify their Boolean logic. For more information about how Boolean logic and nested filters work in Reporting and other Tanium solutions, see Tanium Console User Guide: Overview of advanced filters. 1. Expand the **Filters** section. 2. Click add and select one of the following options. Repeat this step for each filter. • **Add Row**: Add one or more conditions that results must match. For each condition, select a source, select a column if the source is a multi-column sensor, select one of the Filter operators on page 61, enter a value to match, and Apply the filter. If you add multiple rows, click the **AND**/**OR** toggle to select the Boolean logic. • **Add Group**: Select this option to add a nested filter. Click the **AND**/**OR** toggle to select the Boolean logic for the group, add a row or subgroup, configure the conditions for each row in the group or subgroup, and Apply the filter. 3. Select whether Reporting evaluates the filters per line or per cell. This applies when cells in the grid contain multiple lines of values, and you have added multiple filters with **AND** logic. For example, you might have a report that flattens by the **Computer Name** and includes the **Installed Applications Name** and **Installed Applications Version** columns. In the **Computer Name** column, each computer name appears as a single row, while the **Installed Applications Name** and **Installed Applications Versions** columns include multiple entries for each computer.  If you add the filters `Installed Applications Name is equal to Winzip` and `Installed Applications Name is equal to Arduino`, and select **AND** logic, Reporting evaluates the filters based on whether you select **Enable Nested Filter Control**: • Disabled (default): Per-line filtering applies globally. Reporting evaluates all the **AND** filters as a single condition and evaluates each line individually, per source, within each row, using the filters you define. For the example filters, Reporting evaluates to a positive results match if any single application (a single line in the cell) has both `Winzip` and `Arduino` in its name. There is no application that matches that condition, so the grid

Report and Explore Data widgets (continued)

Widget	Description
Filter Group	After you select one or more filter groups, the grid show results only from those groups. If the list of groups is long, use the search field within the **Filter Group** dropdown list to quickly find groups. The search field shows each selected group as a pill with an **X** (such as **All Windows X**). Click **X** to remove the group from the filters. Some Tanium-managed reports are associated with an action group that has filter groups as members. These reports show a pill for each member under the other basic filter fields. If you do not have RBAC permissions for one of those filter groups, the pill label is **Inaccessible Group**. You can remove filter groups that are members of an action group, but you cannot add an action group as a filter or restore members that you removed. NOTE The **Filter Group** dropdown list contains only the groups that are assigned to a content set for which you have **Filter Group read** permission. For more information about filter groups, see Tanium Console User Guide: Managing filter groups. For more information about configuring and assigning role permissions, see Tanium Console User Guide: Managing roles. For more information about action groups, see Tanium Console User Guide: Managing action groups.
OR/AND	Select **AND** if an endpoint must match all the basic filters (Filter Group on page 56, Endpoint Last Seen on page 56, and OS on page 56) for the report to include results from the endpoint. Select **OR** if an endpoint must match at least one of these filters for the report to include results from the endpoint. If you select multiple filter groups and select **AND**, all the selected filter groups must return the results for the report to include those results. This setting has no effect if you apply only one basic filter.
Endpoint Last Seen	Select a date range to show results only from endpoints that were online during that range. If you do not select a range, results include all data stored in TDS for the last 30 days.
OS	Filter the results grid by endpoint OS: • **All** OSs • Windows • macOS • Linux
Clear Filters	Clear all the filters that you defined through the Filter Group on page 56, Endpoint Last Seen on page 56, OS on page 56, and Filters (advanced) on page 55 widgets.

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Report and Explore Data widgets (continued)

Widget	Description
 Refresh	If endpoint data might have changed since you opened the report or added sources, click Refresh  to show the updated data. You cannot save the refreshed view of the data; the next time you open the report, it shows any changes to the data since the last time you viewed it. To save the current data as a CSV file, see Export reports in CSV format on page 77.
Chart result filter	If a chart (visualization) is configured, you can click a result in the chart to filter the grid by that result. For more information about chart settings, see Configure a chart on page 66.
Show Visualization 	Use the **Show Visualization** toggle to show  or hide  the chart if one is configured. If the report is in edit mode or you are on the **Explore Data** page, open the  dropdown list to see the toggle. You cannot save your selection; the next time you open the report, it shows the chart.
Manage visualizations Manage recommended actions 	These options appear only on the **Explore Data** page or a report in edit mode. Select an option from the dropdown list: • **Add/Edit Recommended Action**: If you expect users to commonly deploy specific actions to the endpoints that provide data in a report, you can add up to five recommended actions to that report. For more information, see Manage recommended actions on page 87. • **Add Visualization**: This option appears only if the report does not already include a chart. To configure a chart, see Configure a chart on page 66. • **Edit Visualization**: Reconfigure any of the chart settings that are described under Explore data and create reports on page 63. • **Remove Visualization**: Delete the chart.
Drill Down in Interact	To view additional information about endpoints by issuing a new question, select the rows of results from the target endpoints and click **Drill Down in Interact**. For more information, see Explore report data in Interact on page 84.
Actions	To deploy an action to endpoints, select the rows of results from those endpoints and select an **Actions** option. For more information, see Deploy actions or run playbooks on page 86.
Purge endpoint data 	Tanium Data Service (TDS) caches the endpoint data that reports and dashboards show. To prevent reports and dashboards from showing data from certain endpoints, select the data from those endpoints and select a purge option. For more information, see Purge endpoint data on page 89.
Export (CSV format) 	To export the results grid as a CSV file, click  and perform the steps under Export reports in CSV format on page 77.

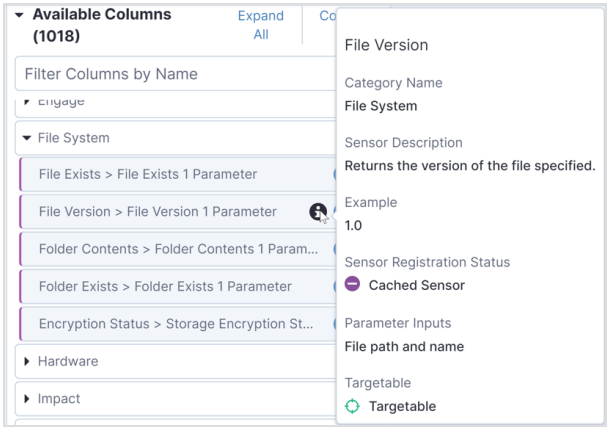
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Report and Explore Data widgets (continued)

Widget	Description
Filter items	Enter an alphanumeric string in the **Filter items** field to show only the matching data values in the results grid. You cannot save this filter; the next time you open the report, it does not apply the string that you entered the last time. NOTE The total row count shows how many rows match the filter condition out of all rows. For example, **4 of 11** appears when 4 out of 11 rows match.
Customize columns 	Click Customize Columns to change how the results grid shows columns: • Drag the column names in the desired order. • Select or clear the checkboxes to show or hide columns.
 (column header) Customize column names	You can customize a column name in the **Explore Data** page or in a report that is open. However, the change does not apply in other reports that include the same column. Nor does the change apply in the configuration of the sensor that provides the column data. 1. (Reports only) Click **Edit Data** to enter edit mode. 2. Click in the column header, edit the name, and click **Apply**. 3. (Reports only) Click **Save** to save the change.
 (column header) Sort grid rows	Click a column header to sort the grid rows in ascending order based on the alphanumeric values in that column. Click the header again to switch to descending order. Click the header a third time to remove the sorting. To sort multiple columns, press **Shift** as you click the column headers. The headers show a number to indicate the sorting order for multiple columns. You can sort up to five columns. To remove sorting from a column, press **Shift** as you click the number in the column header.

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Report and Explore Data widgets (continued)

Widget	Description
(column header) View source details	To view the description and details for a source in a report or the **Explore Data** page, hover over Info beside the source name in the column header or in the **Source Data** panel. NOTE The details indicate if the source is present on endpoints or not present, which affects targeting for questions and actions. For more information, see: • Question targeting on page 84 • Deployment and playbook targeting on page 86 
(in grid) View endpoint details	The Endpoint Details icon appears only if the results grid includes the **Computer Name** source. The icon opens the Endpoint Details page, which shows additional information about a specific endpoint. For more information, see Working with a single endpoint on page 143.
Count (in grid)	To view additional information about endpoints that are associated with a common value (such as endpoints that are missing scan results), click the **Count** value for the endpoints to open a drill-down report. For more information, see Work with drill-down reports on page 88.

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Report and Explore Data widgets (continued)

Widget	Description
(in **Count** column) Filter by Count	You can configure a filter for the **Count** column to show only the rows where the count meets the filter condition. For example, if the filter condition is set to `is greater than 1`, the grid displays only rows with a count above 1. 1. (Reports only) Click **Edit Data** to enter edit mode. 2. In the **Count** column header, click Filter. 3. Select one of the following operators: • is equal to • is less than • is less than or equal to • is greater than • is greater than or equal to 4. Enter the count value you want to filter by. 5. (Optional) To configure additional filters, click **Add Row** and define the operator and count value. 6. Click **Save**. After you configure a filter for the **Count** column, the Filter by Count icon appears in the **Count** column header. NOTE The total row count shows how many rows meet the filter condition out of all rows. For example, **4 of 11** appears when 4 out of 11 rows meet the condition.
(in grid) Filter by cell value	To filter the results grid by a particular cell, hover over the cell, click Options, and click Filter by Value. The filter condition then appears in the Filters (advanced) on page 55 section.
(in grid) Copy cell contents	To copy the contents of a single results grid cell, hover over the cell, click Options, and click Copy Cell Value.
See all (in grid)	Any results grid cell with more than eight rows of data provides a **See all** link instead of showing additional rows. Click the link to open a dialog that shows all the data in that cell.

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Report and Explore Data widgets (continued)

Widget	Description
 (in grid) Resize columns	To expand or shrink the width of a results grid column, hover over the right-side column border in the column header until the border ↔ icon appears and then click and drag the border.

Filter operators

Filter expressions can match strings or regular expressions. The following table describes the operators that you can use to configure advanced filters in reports (see Filters (advanced) on page 55) or configure a data source condition in a dashboard (see Source on page 110). The available operators vary by source.

Table 1: Filter operators

Filter operator	Usage
contains	The sensor value contains the specified string. Example: `running processes contains "chrome"` NOTE If you use this operator to filter by date values, you cannot target the results for action deployment or drilling down into Interact.
does not contain	The sensor value does not contain the specified string. NOTE If you use this operator to filter by date values, you cannot target the results for action deployment or drilling down into Interact.
starts with	The sensor value starts with the specified string. Example: `starts with "chrome"`
does not start with	The sensor value does not start with the specified string.
ends with	The sensor value ends with the specified string. Example: `ends with "chrome.exe"`
does not end with	The sensor value does not end with the specified string.
matches regex	The sensor value matches the specified regular expression. NOTE If you use this operator to filter by date values, you cannot target the results for action deployment or drilling down into Interact.

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Table 1: Filter operators (continued)

Filter operator	Usage
does not match regex	The sensor value does not match the specified regular expression. NOTE If you use this operator to filter by date values, you cannot target the results for action deployment or drilling down into Interact.
has no value	The sensor did not return a value; the report data grid shows a blank cell for the sensor.
is Tanium error	The sensor returns one of the following errors: • `TSE-Error: <error code or message>` • `current result unavailable` • `results currently unavailable` • `too many results` • `hash collision detected` For more information about these errors, see Tanium Console User Guide: Troubleshoot question results issues.
is not Tanium error	The sensor value is not any of the errors listed in is Tanium error on page 62.
NOTE If a sensor column defines a date in a non-standard format, such as formats other than RFC 822 or Windows Management Instrumentation (WMI), the following options might not work properly. For example, if a sensor column stores a date in the format `DDD, MMM dd, YYYY` (such as Sat, Jan 01, 2000), and you select `is equal to` and enter the date `2000-01-01`, the evaluation might return no results because none of the sensor column dates match the expected date value format. Instead, use the `contains`, `does not contain`, `matches regex`, or `does not match regex` operators to evaluate dates in non-standard formats. If you apply the following operators to a column with values that provide valid dates but not times, Reporting assumes the time is 00:00 (12:00 AM) and applies UTC time to the filter. In such cases, the assumed time of 00:00 overrides any time that you manually specify for the filter.	
is equal to	The sensor value is equal to the specified value or string.
is not equal to	The sensor value is not equal to the specified value or string.
is less than	The sensor value is less than the specified value or string.
is less than or equal to	The sensor value is less than or equal to the specified value or string.
is greater than	The sensor value is greater than the specified value or string.
is greater than or equal to	The sensor value is greater than or equal to the specified value or string.

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Table 1: Filter operators (continued)

Filter operator	Usage
NOTE	The following options appear only if the column that you are filtering is defined as a date in the sensor definition. If a sensor column defines a date in a non-standard format, such as formats other than RFC 822 or Windows Management Instrumentation, the following options might not work properly. For example, if a sensor column stores a date in the format `DDD, MMM dd, YYYY` (such as Sat, Jan 01, 2020), and you select `within the last 10 years`, even if a value falls within the selected filter timeframe, the evaluation might return no results because none of the sensor column dates match the expected date format. Instead, use the `contains`, `does not contain`, `matches regex`, or `does not match regex` operators to evaluate dates in non-standard formats. If a value has a valid date but does not include a time, Reporting assumes the time is 00:00 (12:00 AM) and applies UTC time to the filter.
within the last	The sensor value is a past date/time within a specified period. To define the period start date, enter a number and select a time unit (day, month, or year). The end date is the current day.
within the next	The sensor value is a future date/time (such as a compliance or expiration date) within a specified period. The period start date is the current day. To define the period end date, enter a number and select a time unit (day, month, or year).
not within the last	The sensor value is a date/time that occurs before or after a specified period in the past. To define the period start date, enter a number and select a time unit (day, month, or year). The end date is the current day. For example, `not within the last 1 day` specifies dates that occur before or after the previous 24 hours. Future dates apply to values such as compliance or expiration dates.
not within the next	The sensor value is a date/time that occurs before or after a specified period in the future. The start date is the current day. To define the period end date, enter a number and select a time unit (day, month, or year). For example, `not within the next 1 day` specifies results that occur before or after the next 24 hours. Future dates apply to values such as compliance or expiration dates.

Explore data and create reports

Use the **Explore Data** page to create a view of endpoint data in grid format and add an optional chart to visualize the data. You can then save the view as a custom report. After you add **Source Data** to the view, you can explore and manage endpoints with or without saving the view as a report. Perform the following tasks to create a view of endpoint data, optionally use the view to explore the data or manage endpoints, and save the view as a report.

1. Add source data on page 64
2. Configure data filters and presentation on page 66
3. Configure a chart on page 66
4. Explore data and manage endpoints on page 74
5. Save a data view as a report on page 74

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TIP

Tanium-managed reports might provide the information that you want without the need to create a view on the **Explore Data** page or create a custom report. For more information, see Tanium-managed reports on page 16.

If an existing report is similar to the report that you want to create, cloning the existing report is often easier than creating a report from scratch. For more information, see Clone reports on page 74.

You can also copy the configuration of a non-editable report to the **Explore Data** page and then modify the configuration there without changing the original report. For more information, see Explore data on page 54.

Add source data

When you work in the **Explore Data** page or edit a report, the **Source Data** panel lists all registered sensors, along with certain sources of data that are not present on endpoints (see Registered sensors on page 14). You use the panel to add data sources as columns to the grid in the page or report. Each column lists the results that endpoints returned for the corresponding sensor or lists the values that Tanium solutions calculated for other data sources. If a single source produces multiple columns of results, the column headings show the source name above the column names.

If the **Source Data** panel does not list all the sensors that you want to add to the grid, you can first add sensors to the panel by registering them with TDS, as described in Tanium Interact User Guide: Register or unregister sensors for collection. The availability of data sources other than sensors depends on which Tanium solution you have installed. For example, the **Impact Rating** data source requires Tanium Impact.

When the **Source Data** panel has all the data sources that you want to use, perform the following steps to add sources to the grid.

NOTE

If the **Source Data** panel does not list certain sensors after you register them, check the permissions and other requirements in Data sources on page 171.

1. Perform one of the following steps based on whether you plan to edit an existing report or create a new view of endpoint data that you might or might not save as a report.
   - **Existing report**: Open the report (see View reports on page 48) and click **Edit Data**.

     NOTE

     Certain limitations apply when editing reports. For more information, see Limitations when editing report attributes on page 75.

   - **New view or report**: From the Main menu, go to **Data > Explore Data**.

     TIP

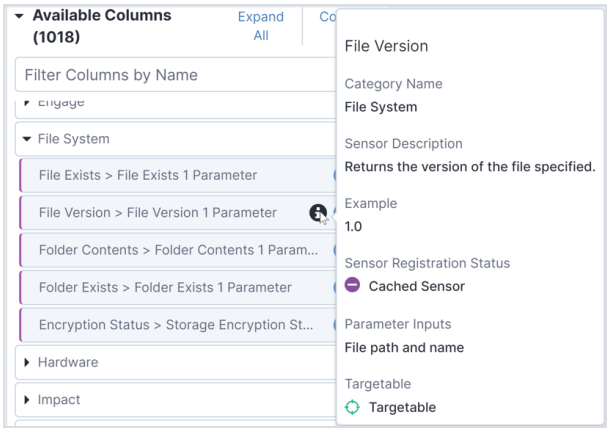
     You can also access the **Explore Data** page from:

     - An existing report: Click **New Report** or, in a non-editable report, click **Explore Data**.
     - The **Data > Reports** page: Click **Create Report**.

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2. Perform the following tasks in the **Source Data** panel to add, remove, or modify sensor columns in the data grid. You can add no more than 25 columns regardless of whether they derive from single-column or multi-column sensors.

Manage source data for a report

Task	Description
View source details	To view the description and details for a source, hover over Info beside its name. NOTE The details indicate if the source is present on endpoints or not present, which affects targeting for questions and actions. For more information, see: • Question targeting on page 84 • Deployment and playbook targeting on page 86 
Add sources	In the **Available Columns** list, browse the available sensors and fields that you can add to the report. Expand each category of sources to lists its sensors and fields. To add a source, click Add beside its name. To add a subset of the columns in a multi-column sensor, expand the sensor and Add each column that you want to include. Reporting prompts you to select parameters if a source requires them.
Remove sources	In the **Selected Columns** list, click Remove beside a source name to remove it from the report, including all the columns in a multi-column sensor. Click Remove beside a particular column name to remove only that column in a multi-column sensor.

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Manage source data for a report (continued)

Task	Description
Reorder and hide/show columns 	In the grid header, click Customize Columns to perform the following operations: • Drag the column names in the desired order. • Select or clear the checkboxes to show or hide columns.
Customize column names 	You can customize a column name, but the change does not apply in other reports that include the same column. Nor does the change apply in the configuration of the sensor that provides the column data. Click in the column header, edit the name, and click **Apply**.
Flatten data 	In the **Selected Columns** list, click beside a source name to flatten the grid data for that source. The icon indicates the column that is currently flattened. By default, data in the report grid is flattened for the first column that you add to a report. For more information about flattening, including an example, see Flattened data on page 17.

Configure data filters and presentation

After you Add source data on page 64 to a report or the **Explore Data** page, you can perform the following optional tasks.

- Filter data on page 50 to limit the endpoint results that the report or **Explore Data** page shows in the data grid. The filters also apply to the chart if you add one.
- Edit data presentation on page 51 to customize the grid columns, sorting, and other data presentation options.

Configure a chart

After you Add source data on page 64 to a report or the **Explore Data** page, you can add a chart (visualization) for the grid data.

> **NOTE** A dashboard chart might derive its data from a report. However, the settings that you configure for a chart in that report have no effect on the settings that you configure for the dashboard chart. For more information about dashboard charts, see Add chart panels on page 106.

1. Click Add and select **Add Visualization**.

> **TIP** The dropdown list also contains the **Edit Visualization** and **Remove Visualization** options if you want to make those changes later.

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2. Configure the chart settings:

Chart settings

Setting	Description
Panel Name	Enter a name of up to 255 characters to serve as a chart heading.
Panel Description	Enter a description to help other users understand the purpose and contents of the chart.
Group By Column	(Optional) Select one or more report columns by which to group data on the chart. Reporting performs aggregations for each group that you select. The combined values of the selected groups appear as labels on the chart. Reporting automatically populates the dropdown list with the report columns. If you do not select an option, Reporting shows results as a single aggregate.
Aggregate	Aggregation summarizes the data in each group. The available options depend on the selected chart type. For example, numeric aggregations like sum are only available with numeric columns. Aggregation options: • **Total Count**: Display the sum of all values in the Count column. Reporting automatically aggregates the results by **Total Count** if you do not select an **Aggregate**. • ***<column name>* Count**: Display the total number of items for the column. • ***<column name>* Unique Count**: Display the total distinct items for the column. • **Row Count**: Display the number of rows only when no **Group By Column** is selected, and the **Group Tanium Errors** toggle is off. • **Percentage**: (Number charts only) Display the data as a percentage of the selected group divided by the total of all groups in the source column. For example, consider a column that contains 100 rows: 75 rows contain **True**, 20 rows contain **False**, and 5 rows contain **N/A**. If you aggregate by percentage and select **False** for the **Group**, the percentage that appears is 20% based on the formula (20 / (75+20+5)) * 100. This option is only available for number charts. • ***<column name>* [Average | Max | Min | Sum]**: If the report contains numeric columns, you can also aggregate the data in each group based on a numeric column. The following options are available for each numeric column: ◦ **Average**: Display the total value of all items in the group (the **Sum**) divided by the number of items in the group. ◦ **Max:** Display the maximum item value in the group. ◦ **Min**: Display the minimum item value in the group. ◦ **Sum**: Display the total value of all items in the group.

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Chart settings (continued)

Setting	Description
Group Tanium Errors (Report sources only)	This toggle is turned on by default but applies only if you select a **Group By Column**. For the selected column, **Group Tanium Errors** groups all the results that match one of the following errors: • `TSE-Error: <error code or message>` • `current result unavailable` • `results currently unavailable` • `too many results` • `hash collision detected` For details about these errors, see Tanium Console User Guide: Troubleshoot question results issues. If you clear **Group By Column**, the panel shows the errors ungrouped by type.

3. Configure the default display settings.

Setting	Description
Timeframe	Select a timeframe from which you want the panel to show data. The default is **Current**. For more information, see Date options on page 187.

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Setting	Description
Default Computer Group	This option appears only if you selected **Report** as the source type (see Working with Reporting reports on page 48). Select the default computer group for which to show data in the chart. The options include only computer management groups that are selected for collection in Reporting (see Select computer groups for data collection on page 46) and that you have RBAC permission to access. To show data from all endpoints, select **All Computers**. You can select one of the following types of computer group: • **Historical Collection Enabled**: This list includes computer management groups that are selected for collection in Reporting (see Select computer groups for data collection on page 46). You can see both historical and current data for these groups. • **Current Data Only**: This list includes filter groups that are not selected for collection in Reporting but have membership based on sensors that are registered with TDS. You can see only current data for these groups, not historical data. To check which sensors a group uses, see its **Expression**, as described in Tanium Console User Guide: View filter group details. To check if a sensor is registered, and to register it if necessary, see Tanium Interact User Guide: Managing Tanium Data Service (TDS). You require RBAC permissions for computer management groups and filter groups to see them in the dropdown list. See Tanium Console User Guide: Managing RBAC. BEST PRACTICE When you view a dashboard, you have the option to select a dashboard-level Working with Reporting reports on page 48 that overrides the chart-specific **Default Group**. For example, if you set the **Default Group** to **All Windows**, a user can open the dashboard and set the dashboard-level **Computer Group** to **All Windows Workstations** to make the chart show data only from workstations. However, users might select a computer group that overrides your intended use for the chart, such as selecting **All Mac** for a dashboard with charts that are relevant only for Windows endpoints. To avoid such overrides, set the **Default Group** to **All Computers** and select a chart-specific Working with Reporting reports on page 48 to filter the results. The dashboard-level **Computer Group** does not override the **Filter Group**.

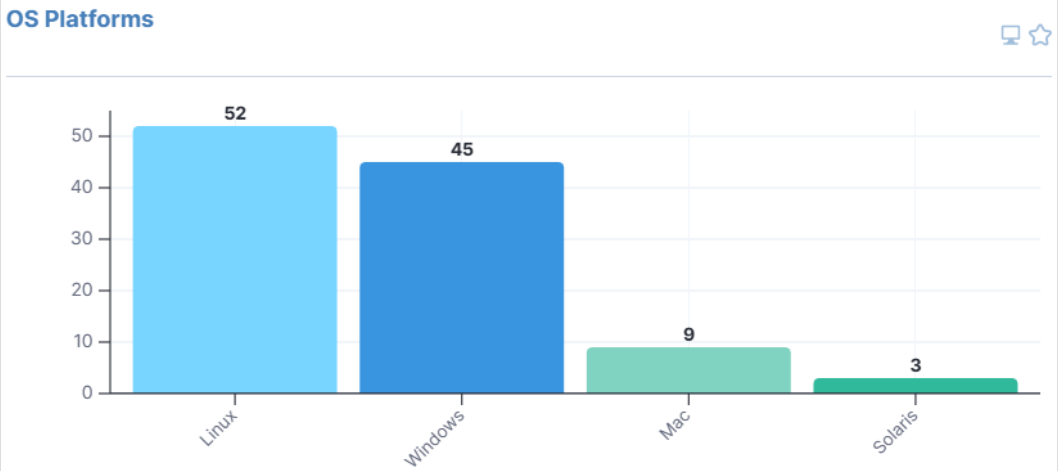
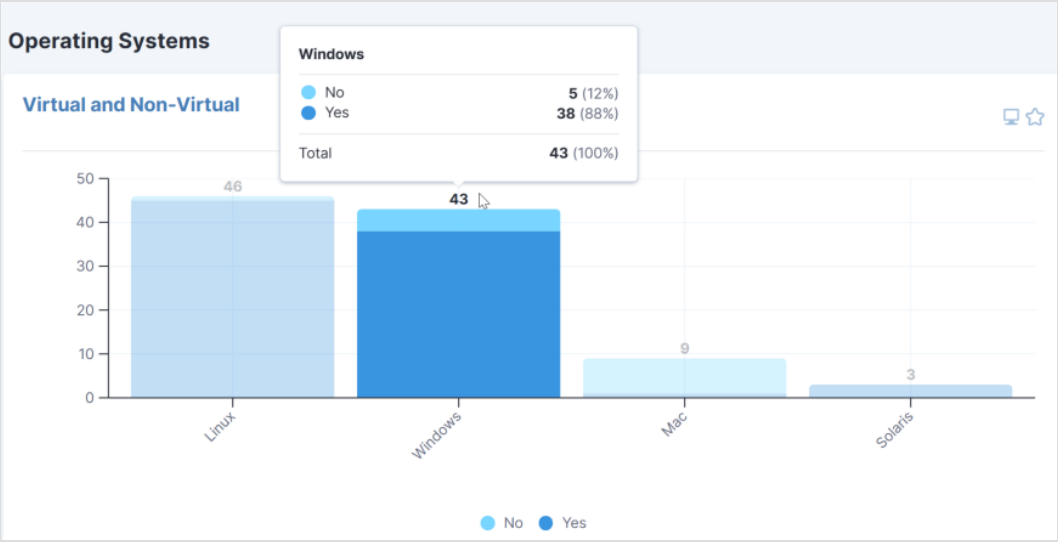
4. Select vertical bar or donut as the chart type. For more information, see Chart types on page 180.

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5. Configure the following chart options and click **Save and Finish**. The available settings vary by report and chart type.

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Chart panel settings

Setting	Description
Display (Vertical bar charts only)	**Display** options appear only if the report has multiple data sources. Otherwise, bar charts automatically use the **Standard** option. • **Standard**: Each bar in the chart represents a unique result from the column that you selected in **Group By Column**. For example, if the **Group By Column** is **OS Platform**, the chart shows a bar for each platform in your environment, such as Linux, Windows, macOS, and Solaris.  • **Stacked**: Each bar in the chart represents a unique result from the **Group By Column** and, within each bar, one or more segments represent unique results from the column that you select in **Stack by Column**. For example, if the **Group By Column** is **OS Platform**, the **Stack by Column** is **Is Virtual**, and the **Segment Values** (results) are **Yes** and **No**, then each bar has up to two segments: one for **Yes** results and one for **No** results. In the following example, the bar for the Solaris platform has only a **Yes** segment because all the Solaris endpoints that returned results for the chart are virtual.  Define the following settings for a stacked bar chart: ◦ **Stack by Column**: Select the column that provides the results that show in the segments of each bar. ◦ **Segment Values**: Select up to 10 unique results from the **Stack by Column**. Each unique result shows as one segment in each bar. To specify a future anticipated result that is not yet present in the **Stack by Column**, type the

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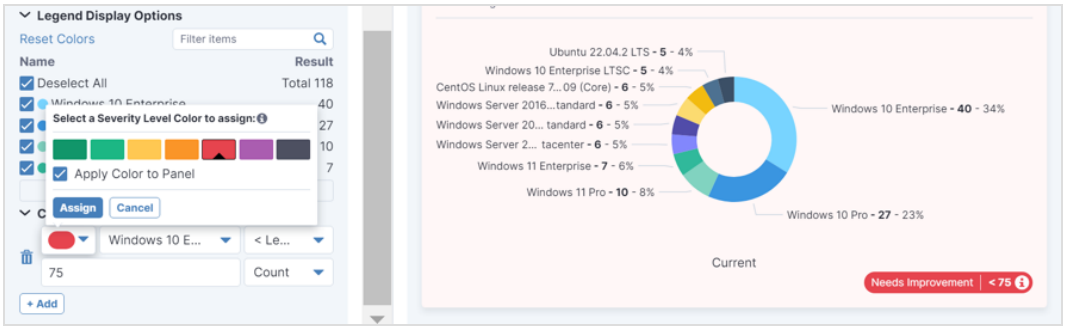
Chart panel settings (continued)

Setting	Description
Max Results	Select a predefined maximum number of items to show in the chart. The maximum is 100.
Scale (Vertical bar charts only)	Select how to scale values on the y-axis: • **Linear**: Use consistent values on the y-axis. For example, if the minimum data point on a chart is 1, and the maximum data point is 100, the y-axis values would be 0, 20, 40, 60, 80, and 100. • **Logarithmic**: Scale the y-axis on an exponential basis. Use this option for charts that contain a large range of data points.
Value Format	Select a format for the chart values if the **Aggregate** is set to a percentage or numeric column value: • **Percent**: Adds % as a suffix to the values • **None**: No suffix is added The format selection controls only the value unit that appears in the chart and does not change the actual value. The format option is not available for table charts or charts in which the **Aggregate** is set to **Count**.
Sort 	Select a **Group By Column** or **Aggregate** option by which to sort items in the chart. Click for ascending order (low to high) or for descending order (high to low). For example, if you select **CVSS v3 Severity** as the **Group By Column**, you can sort by severity level: critical, high, medium, and low. **Count** is the default sorting option, and it is the only option if you do not select a **Group By Column**.
Timeframe Label (Donut charts only)	Enter text to display under the chart.
X-Axis Label (Vertical bar charts only)	Enter a label to display horizontally under the chart.
Y-Axis Label (Vertical bar charts only)	Enter a label to display vertically to the left of the chart.
Legend Display Options	Use this section to customize the items that appear in the chart. • **Exclude items**: Clear the checkbox for an item to exclude that item from the chart. • **Customize colors**: Click the colored disk beside an item to change the color that the chart uses for the item. Multiple items can use the same color.

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Chart panel settings (continued)

Setting	Description
Conditional Formatting	Conditional formatting helps users identify issues that need attention. If chart data matches the specified threshold, the chart shows a label and (optionally) background color that indicates the issue severity. In the following example, risk scores match the **Needs Improvement** threshold:



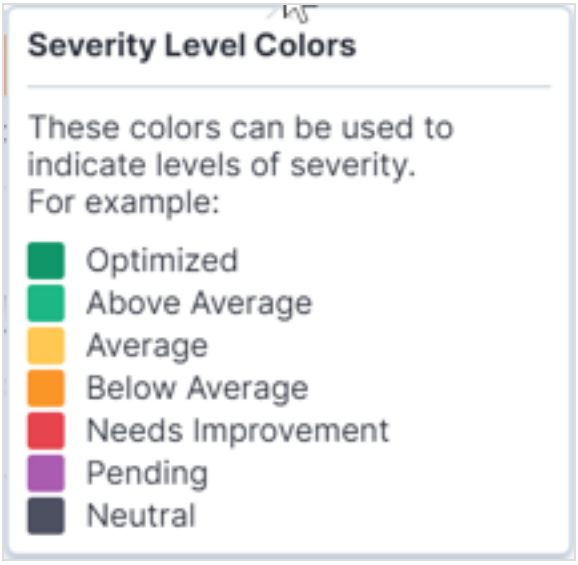
If you add multiple conditions to a chart, Reporting evaluates them in descending order: it applies the first condition that matches the corresponding threshold.

If you specify exclusions in the **Legend Display Options**, Reporting still evaluates the excluded items and applies conditional formatting if they match thresholds.

To add conditional formatting:

a. Expand the **Conditional Formatting** section and click **+ Add**.

b. Click the severity color dropdown list and select a severity level for the label to show:



c. Select **Apply Color to Panel** to apply the color to the chart background or clear the checkbox to retain the default background color.

d. Click **Assign** to apply your selections.

e. In the **Select Group** dropdown list, select the result on which to base the condition. Reporting populates the dropdown list based on the **Group By Column** setting.

f. Select an **Operator** (such as **< Less Than**) for matching the condition.

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Explore data and manage endpoints

After you Add source data on page 64 to a report or the **Explore Data** page, you can perform the following optional tasks to explore endpoint data or manage endpoints.

- Explore report data in Interact on page 84
- Access endpoint details from a report or the Explore Data page on page 143
- Open a drill-down report on page 89
- Deploy actions or run playbooks on page 86

Save a data view as a report

After you Add source data on page 64 on the **Explore Data** page, you can save the view as a report. If you Configure data filters and presentation on page 66 or Configure a chart on page 66, those options are saved to the report.

1. (Optional) Add recommended actions to the report if you expect users to commonly deploy specific actions to the endpoints that provide the report data. For more information, see Manage recommended actions on page 87.
2. Click **Save Report**, configure the following settings, and then click **Save**.

Report settings

Setting	Description
Report Name	Enter a name of up to 255 characters to identify the report.
Content Set	Assign the report to a **Content Set**. The dropdown list shows only the content sets for which you have **Report write** permission. Only users who have **Report read** permission for the content set can access the report.
Description (optional)	Enter a description for other users to understand the purpose and contents of the report.
Labels (optional)	Assign one or more labels to use when filtering the **Reports** page by labels. If the list of labels is long, use the search field within the dropdown list to quickly find labels. The search field shows each selected label as a pill with an **X**. Click **X** within a pill to unassign that label or click the **X** to the right of all the pills to unassign all labels. To simultaneously create and assign a label, type its name in the **Labels** search field and select **Create <_name_>** in the dropdown list. For more information on labels, see Managing labels on page 165.

Reporting opens the saved report in view mode. For more information, see View reports on page 48.

Clone reports

If the settings and contents of an existing report are similar to the report that you want to create, cloning the existing report is often easier than creating a report from scratch. Labels are copied from the existing report to the clone. Any filters or sorting that you configured when viewing the existing report are not saved in the clone.

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1. Open the report that you want to clone. For more information, see View reports on page 48.
2. Click **Save As**, configure the Report settings on page 74, and click **Save**.
   Reporting saves the report and opens it in view mode.
3. Click **Edit Data** and edit the report data sources if necessary. For more information, see Manage source data for a report on page 65.
4. Edit the data filters and presentation options if necessary. For more information, see Configure data filters and presentation on page 66.
5. Edit the chart if necessary. For more information, see Configure a chart on page 66.
6. Click **Save** after you finish editing the clone.

Edit reports

Limitations when editing report attributes

The following limitations apply when you edit reports:

Limitations for report edits

Limitation	Description
Custom reports	You can edit all the attributes of a custom report, including data sources, charts, data filters, recommended actions, presentation, and basic settings.

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Limitations for report edits (continued)

Limitation	Description
Tanium-managed reports	The only edits you can make to Tanium-managed reports are: • Add labels. • Change the content set assignment if the reports are not locked. When you open a report and Edit the basic Report settings on page 74, a lock icon appears next to the **Content Set** if the report is locked and the content set assignment cannot be changed. • Change the favorites assignment /. You can edit filters and other presentation options while you view the reports but you cannot save the edits. The following alternatives are available for editing all the report attributes: • Clone the report, edit the settings of the clone, and save it as a new report. For more information, see Clone reports on page 74. • Copy the report settings to the **Explore Data** page, where you can edit and save the settings as a new report without altering the original report. For more information, see Explore data on page 54. NOTE If you remove Tanium-assigned labels from a Tanium-managed report, those labels are restored the next time you update or re-import Reporting. However, if you remove labels that another user assigned to a Tanium-managed report, the update or re-import does not reassign them. For more information about Tanium-managed reports, see Tanium-managed reports on page 16.
Content sets	You cannot edit reports that are in a content set for which you do not have **Report write** permission. However, if you have that permission for other content sets, you can copy the report settings to the **Explore Data** page, edit the settings, and save them as a new report.
Dashboard panels	If a report provides data for a dashboard panel and has a **Group By Column** selection, you cannot perform the following edits: • Remove the data source that the panel uses for the **Group By Column** or **Aggregate** selections. For more information, see Panel settings: basic on page 107. • Select a different sensor for flattening data. For more information, see Flattened data on page 17. TIP To determine if dashboards use a report, see <Report name> on page 53. From basic report settings, you can open the associated dashboards to view their chart settings.

Edit a report

Perform the following steps to modify a report configuration.

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TIP To edit the label assignments of multiple reports in a single operation, see Manage label assignments for reports on page 167.

1. From the Main menu, go to **Data > Reports** and click the **Report Name**.
2. To edit basic Report settings on page 74, click Edit beside the report name, update the settings, and click **Save**. If you plan to save your edits as a new report, you can change the settings later in this procedure.
3. To change the favorite status of a report, click the toggle beside the report name to include the report in the favorites list or exclude it from the list.

   The remaining steps apply only to custom reports.
4. To change which endpoint data the report includes, click **Edit Data** and reconfigure the data sources as described in Manage source data for a report on page 65.
5. To edit the data filters and presentation options, see Configure data filters and presentation on page 66.
6. To edit a chart, see Configure a chart on page 66.
7. To change which recommended actions are available, see Manage recommended actions on page 87.
8. Click one of the following buttons:
   - **Save** to update the current report with your edits.
   - **Save As** to save the updated settings as a new report. Configure the basic Report settings on page 74 and click **Save**.

Export reports in CSV format

You can download a report as a CSV file to the downloads folder of your browser on the computer that you use to access Tanium Console. The file size limit is 500 MB.

NOTE The export process times out after one hour and Reporting shows an error message that indicates the export failed.

TIP Use Tanium Connect to export reports in CSV format when the file size exceeds 500 MB or when you see export failure messages. For more information, see Export reports through Tanium Connect on page 79.

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1. From the Main menu, go to **Data > Reports**.
2. Click the **Report Name** to open the report and then click Export to CSV .
3. Configure the following settings and click **Export**.

CSV file settings

Setting	Description
File Name	The default file name is the report name, but you can enter a custom name. If you omit the file extension, Reporting appends `.csv` to the file name.
Include Headers	Select this option to include column headers (source names) in the CSV file.
Delimiter	Select a character to function as a delimiter for values in the CSV file: • **Comma** • **Single space** • **Semicolon** • **Tab**
Compression Type	Select a type of file compression: • **None** • **Zip** • **Gzip**

Export reports in JSON format

You can export reports configurations as a JSON file to the downloads folder of your local browser. You can then import the file into another Tanium Server (see Import reports on page 80).



You require a role with the **Report read** permission to export reports. The predefined roles that have this permission are Reporting Operator, Reporting User, and Reporting Viewer.

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1. From the Main menu, go to **Data > Reports**.
2. Perform one of the following steps based on whether you want to review a report before exporting it:
    - **No review**: Select the reports to export and select **Export > Report Definition as JSON** (single report) or click **Export Report Definitions** (multiple reports).
    - **Review**: Click a **Report Name** to open and review it. If you decide to edit the filters, note that you cannot export the report until you re-save it (click **Save**), create a clone (click **Save As**), or revert to the original filters. When you are ready to export, select **Export > Report Definition as JSON**.

The exported file has the name `report_definition_export_<month_day_year>.json`.

Export reports through Tanium Connect

Use Connect to send reports to external destinations, such as an email address or a security information and event management (SIEM) tool.

Before you begin

Ensure that you meet the following criteria to export a report through Connect:

- The report has no duplicate column names.

  For example, a report might have duplicate columns if each derives from the same parameterized sensor even though each column reflects a unique parameter value.

  The workaround is to change the display names of the columns in the report. For example, if a report has two columns for the **Installed Application Exists** sensor, one with a parameter value of `Edge` and the other with the value `Chrome`, you can rename the columns to **Edge Exists** and **Chrome Exists**. For more information about how to rename columns, see Customize column names on page 58.

  You cannot work around duplicate column names by renaming the columns in the collection configuration.

- Your Tanium license includes Connect 5.9.65 or later and Reporting 1.7 or later.
- The user account or persona that you use for exporting has the following role assignments and permissions:
    - Connect Operator or Connect Administrator role to access Connect.
    - **Report read** and **Report API user** permissions. Predefined roles that have these permissions include Reporting Operator and Reporting User.

For best results, configure filters, flattening, column names, and column ordering in Reporting so that column customizations are not necessary when you set up an export through Connect.

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Create a connection

The following steps describe the basic settings that you configure for a connection. Additional settings vary by connection destination. For more information, see Tanium Connect User Guide: Managing connections.

1. From the Main menu, go to **Modules > Connect > Connections** and click **Create Connection**.
2. In the **General Information** section, enter a **Name** and optional **Description** for the connection.
3. In the **Configuration** section, select **Tanium Reporting (Source Data)** for the **Source**.
4. In the **Report** dropdown list, select the report to export.

   NOTE

   If multiple reports have the same name, the list appends `(Author: <user name>, ID:<report identifier>)` to the duplicate names. To match these names with specific reports, see Identify reports that have duplicate names on page 49.
5. Select the **Destination** where you want Connect to send the report. Provide any additional configuration for the type of destination you select.
6. Go to the **Configure Output** section and select a **Format** for the exported report.
7. (Optional) Configure a **Schedule** to send the report.
8. Click **Save**.

When the connection runs, the report is sent to the destination according to the schedule that you set. To manually export the report using the connection settings, select the connection on the Connect **Overview** page and click **Run Now**.

Import reports

You require the following role permissions to import report configurations that are stored in a JSON file:

- **Report write** permission is required to import reports.
- **Sensor read** permission is required for the content sets that contain the sensors that the imported reports use.
- **Package read** permission is required for the content sets that contain the packages that the imported reports use. A report uses packages if it includes recommended actions. For more information, see Manage recommended actions on page 87.

The predefined roles Reporting Operator and Reporting User have **Sensor read** permission for certain content sets and also have **Report write** permission.

To export reports as a JSON file from another Tanium Server, see Export reports in JSON format on page 78. Then perform the following steps to import the reports into the current Tanium Server.

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1. Copy the JSON file to a system that is accessible from the computer that you use to sign in to Tanium Console.
2. From the Main menu, go to **Data > Reports** and click **Import**.
3. Perform one of the following steps:
    - Drag and drop the JSON file to the **Import a Report.json File** dialog.
    - Click **Browse for File**, select the JSON file, and click **Open**.
4. Review the list of reports in the **File Contents**, optionally clear any reports that you do not want to import, and click **Import**. If the file has no issues to resolve, the import proceeds. If the **Review Import Warnings** page appears, resolve the listed issues as described in the following sections and then click **Import** again.
    - Resolve sensor issues for imports on page 82
    - Resolve package issues for imports on page 83
    - Resolve name conflicts for imports on page 81
    - Resolve invalid content sets for imports on page 83

Resolve name conflicts for imports

If you import a JSON file that contains reports with the same names as reports that already exist on the Tanium Server, select one of the following options to resolve each name conflict.

Name conflict resolution in report imports

Option	
Skip Import	Omit the report from the import process.
Import As New	Import the report and retain its current name, notwithstanding that an existing report has the same name. NOTE To distinguish among reports that have the same name, see Identify reports that have duplicate names on page 49.
Rename	Rename the report that you are importing. When you select this option, a text field appears where you specify the new name.

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Name conflict resolution in report imports (continued)

Option	
Overwrite Existing	Replace the existing report with the imported report. This option is not available in the following cases: • **Tanium managed**: The existing report is Tanium managed. • **Sensors**: The imported report requires sensors that are not registered with TDS, are not present in the environment where you perform the import, or are in a content set for which you do not have **Sensor read** permission. In all these cases, a message indicates the sensors are missing. If you proceed with the import, it omits the affected report. To resolve the issue, see Resolve sensor issues for imports on page 82. • **Packages**: The imported report requires packages that are not present in the environment where you perform the import or are in a content set for which you do not have **Package read** permission. To resolve the issue, see Resolve package issues for imports on page 83. • **Dashboard panel usage**: The imported report provides data for a chart panel in a dashboard, has a **Group By Column** selection, and either of the following conditions apply: ◦ The imported report does not include the data source that the chart panel uses for the **Group By Column** or **Aggregate** selections. For more information about these settings, see Panel settings: basic on page 107. ◦ The imported report uses a different sensor for flattening data than the existing report. For more information about flattening, see Flattened data on page 17. To use the imported report for the dashboard chart panel, see Resolve dashboard panel issues for imports on page 83.

Resolve sensor issues for imports

If you try to import reports and the **Review Import Warnings** page indicates missing sensors, cancel the import and perform the following steps to resolve the issue.

1. Sign in to Tanium Console as a user who has **Sensor read** permission for all content sets.
2. Go to **Administration > Content > Sensors** and verify the presence and content set assignments of the sensors that the **Review Import Warnings** page listed.
3. Perform one of the following tasks based on the issues that you found in the preceding step.
    - **Missing sensors**: Import the sensors from an environment that has them. **Import Signed Content** permission is required to import sensors. For more information, see Tanium Console User Guide: Import sensors.
    - **Insufficient content set permissions**: Ask an administrator to add the necessary permissions to the user account that you use to perform imports. The account must have **Sensor** read permission on all the content sets of sensors that the imported report uses. For more information, see Tanium Console User Guide: Manage content set permissions for a role.
4. Register the sensors with TDS if they are not already registered. **Data Collection Registration** write permission is required to register sensors. For more information, see Tanium Interact User Guide: Manage sensor registration.
5. Re-import the reports for which you resolved sensor issues.

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Resolve package issues for imports

If you try to import reports and the **Review Import Warnings** page indicates packages are missing or are in content sets that you do not have permission to access, cancel the import and perform the following steps to resolve the issue.

1. Sign in to Tanium Console as a user who has **Package read** permission for all content sets.
2. Go to **Administration > Content > Packages** and verify the presence and content set assignments of the packages that the **Review Import Warnings** page listed.
3. Perform one of the following tasks based on the issues that you found in the preceding step.
    - **Missing packages**: Import the packages from an environment that has them. **Import Signed Content** permission is required to import packages. For more information, see Tanium Console User Guide: Import packages.
    - **Insufficient content set permissions**: Ask an administrator to add the necessary permissions to the user account that you use to perform imports. The account must have **Package read** permission on all the content sets of packages that the imported report uses. For more information, see Tanium Console User Guide: Manage content set permissions for a role.
4. Re-import the reports for which you resolved package issues.

Resolve dashboard panel issues for imports

Perform the following steps if you cannot overwrite an existing report that has the same name as an imported report due to discrepancies in the settings for an associated dashboard chart panel.

1. In the import workflow (see Import reports on page 80), select **Rename** or **Import As New** to resolve the name conflict and proceed with the import.
2. Edit the imported report to match the **Group By Column**, **Aggregate**, or sensor flattening selections of the existing report if those settings are important to preserve for the chart panel in the associated dashboard. For more information, see Edit reports on page 75.
3. Edit the chart panel in the dashboard to use the imported report instead of the existing report. For more information, see Edit dashboards on page 103.
4. (Optional) Delete the existing report if you are sure no other dashboards use it and no other users need it. If you selected the **Import As New** option, deleting the existing report prevents other users from confusing it with the imported report.

Resolve invalid content sets for imports

When you try to import a report, the **Review Import Warnings** page might indicate the following issues for the content set that contains the report:

- The content set does not exist in the environment where you perform the import.
- You do not have **Report write** permissions for the content set.

Perform one of the following steps to resolve the issue:

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- On the **Review Import Warnings** page, select **Skip Import** to omit the report from the import process.
- On the **Review Import Warnings** page, select **Update Content Set** to assign another content set. When you select this option, a dropdown list appears for you to select a content set. The dropdown list shows only the content sets for which you have **Report write** permission.
- Cancel the import, create the missing content set, and re-import the report. Only the **Administrator** or **Content Set Administrator** reserved role can create content sets. For more information, see Tanium Console User Guide: Create a content set.
- Cancel the import, ask an administrator to add the necessary content set permissions to the user account that you use to perform imports, and re-import the report. For more information, see Tanium Console User Guide: Manage content set permissions for a role.

Explore report data in Interact

If a report or the **Explore Data** page shows data that warrants further exploration, you can issue a question to the endpoints that provided the data and analyze the results on the Interact **Question Results** page. For example, if the **EP Management - Antivirus Health** report indicates that Windows Defender is off on some endpoints, you can issue the question `Get Installed Application Exists[Windows Defender]` to determine if the application is installed on those endpoints. From the **Question Results** page, you can then explore the data further or deploy a corrective action to the endpoints.

Question targeting

When you issue a question, Interact targets the endpoints based on report sources, configured filters, and your data selections. For example, if the report source is **Operating System**, you apply the filter `Windows OS Type contains Workstation`, and you select the result data for `Windows 10 Enterprise`, the question targets workstation endpoints that run Windows 10 Enterprise.

FILTER LIMITS FOR TARGETING

You can manually configure up to 500 filters per report (see Filter data on page 50). However, Interact can apply no more than 100 filters when targeting endpoints, regardless of whether those filters are manually configured or based on selected data. For example, if the report source is **Installed Applications - Name** and you select a row with 50 values for that column, Interact applies each of those values as a filter for targeting. If the combination of configured filters and filters based on selected data exceeds 100, the **Drill Down in Interact** button is disabled.

EID TARGETING

Reporting targets endpoints based on their endpoint identifiers (EIDs) if you add a report filter that is based on a source that is not present on endpoints, such as **Impact Rating**. Reporting also applies EID targeting if all the report columns are from such sources. A question that uses EID targeting can target a maximum of 255 endpoints.

To determine if a source is present on endpoints, see View source details on page 59.

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Result type restrictions

The **Drill Down in Interact** button is disabled if a report includes results from a multi-column sensor in which the result type is not the same across all columns. For example, you cannot issue a question if a sensor returns both text and numeric results.

Question targeting does not require result types to match among different sensors. For example, you can issue a question from a report with two sensors if all the columns in one sensor have text values and all the columns in the other sensor have numeric values.

To check the result type of columns derived from sensors, see Tanium Console User Guide: Result Types.

Drill down in Interact

1. Perform one of the following steps:
   - Open an existing report that contains the data to explore. For more information, see View reports on page 48.
   - Show the data to explore on the **Explore Data** page. For more information, see Explore data and create reports on page 63.
2. Select the data that you want to explore and click **Drill Down in Interact**.
3. Use one of the following tabs to specify a question and then click **Drill Down**:

Question tabs

Saved Questions	Select a saved question from the list. The list includes questions only if they are assigned to content sets for which you have **Saved Question read** permission. By default, the list includes only questions that have the **Display this question in the list of questions that are available for drilling down** setting enabled. To include questions that do not have the setting enabled, select **Show all questions**. For more information about the setting, see Tanium Console User Guide: Display this question in the list of questions that are available for drilling down. To filter the list so that it includes only saved questions with **Visibility** is set to **Only the Owner and Admins can see this object**, select **Hide public questions**. Hover over the information icon for a question to see its syntax.
Create a Question	Enter a question using the same syntax as in the Interact **Ask a Question** field. For more information, see Tanium Console User Guide: Issue a free-form question.
Build a Question	Construct a question using the same fields as in the Interact **Question Builder**. For more information, see Tanium Console User Guide: Issue a question through the Question Builder.

After you click **Drill Down**, the **Question Results** page shows the results in a new browser tab.

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4. (Optional) Use the **Question Results** page to explore more details about the data (such as by issuing a drill-down question) or to deploy an action to the endpoints that provided the data. For more information, see:

    - Tanium Console User Guide: Managing question results in Console and Interact
    - Tanium Console User Guide: Deploying actions in Console and Interact

Deploy actions or run playbooks

If a report or the **Explore Data** page indicates conditions that warrant intervention on endpoints, you can deploy platform actions or Tanium Patch actions (OS patch deployments) to those endpoints or target the endpoints in a playbook run directly from the report. For example, if the **EP Management - Antivirus Health** report indicates that Windows Defender is off on some endpoints, you can deploy an action that turns it on. If you expect users to commonly deploy specific actions from a report, you can add recommended actions to the report. For example, if a report shows stopped services on Windows endpoints, you can add an action that deploys the **Restart Service** package.



To deploy patches, Tanium™ Patch 3.11 or later must be installed. To create a playbook run from a report, Tanium™ Automate 1.10 or later must be installed.

Role permissions for deploying actions

The following permissions are required to deploy actions from a report or the **Explore Data** page:

- All actions: **Report read** permission is required.
- Platform actions only: **Interact Execute action** permission is required for deploying platform actions.
- Tanium Patch actions only: **Patch Deployment write** and **Patch Deployment execute** permissions are required for creating a Patch deployment.
- Create a playbook run only: **Automate Playbook execute** permission is required to target endpoints in a playbook run directly from a report.

Deployment and playbook targeting

Action deployments and playbook runs target endpoints based on report sources, configured filters, and your data selections. For example, if the report source is **Operating System**, you apply the filter `Windows OS Type contains Workstation`, and you select the results data for `Windows 10 Enterprise`, the deployment targets workstation endpoints that run Windows 10 Enterprise.

FILTER LIMITS FOR TARGETING

You can manually configure up to 500 filters per report (see Filter data on page 50). However, Reporting can apply no more than 100 filters when targeting endpoints, regardless of whether those filters are manually configured or based on selected data. For example, if the report source is **Installed Applications - Name** and you select a row with 50 values for that column, Reporting applies each of those values as a filter for targeting. If the combination of configured filters and filters based on selected data exceeds 100, the **Deploy Action** button is disabled.

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EID TARGETING

Reporting targets endpoints based on their endpoint identifiers (EIDs) if you add a report filter that is based on a source that is not present on endpoints, such as **Impact Rating**. Reporting also applies EID targeting if all the report columns are from such sources. An action that uses EID targeting can target a maximum of 255 endpoints.

To determine if a source is present on endpoints, see View source details on page 59.

Result type restrictions

The **Deploy Action** button is disabled if a report includes results from a multi-column sensor in which the result type is not the same across all columns. For example, you cannot deploy an action if a sensor returns both text and numeric results.

Action and playbook targeting do not require result types to match among different sensors. For example, you can deploy an action from a report with two sensors if all the columns in one sensor have text values and all the columns in the other sensor have numeric values.

To check the result type of columns derived from sensors, see Tanium Console User Guide: Result Type.

Manage recommended actions

If you expect users to commonly deploy specific actions to the endpoints that provide data in a report, you can add up to five recommended actions to that report. Recommended actions have predefined settings, which enable users to deploy them in fewer steps than custom actions. For more information, see Tanium Console User Guide: Deploy a predefined action.

You can also remove recommended actions or change their labels and associated packages.

1. Perform one of the following steps:
    - Open an existing report and click **Edit Data**. For more information, see View reports on page 48.
    - Create a new report on the **Explore Data** page. For more information, see Explore data and create reports on page 63.
2. Click the **+** dropdown list and select **Add Recommended Action** or **Edit Recommended Action**.
3. To add or edit actions:
    a. Enter an **Action Label** for a new action or change the label for an existing action. The label identifies the action in the **Deploy Action** dropdown list on the report page.
    b. Select the **Package Name** of the package to deploy.
    c. For each additional action, click **+ Add Action** and specify the label and package.
4. To remove an action from the **Deploy Action** dropdown list, click Delete in the row for that action.
5. Click **Done** to save your changes.

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Deploy an action or run a playbook

1. Perform one of the following steps:
    - Open an existing report that contains data from endpoints that require the action or playbook run. For more information, see View reports on page 48.
    - Configure the **Explore Data** page to show data from endpoints that require the action or playbook run. For more information, see Explore data and create reports on page 63.
2. Select the endpoints that require an action or playbook run.
3. Click **Deploy Action** and select an option:
    - **Recommended Actions**: Select one of the recommended actions if any are configured for the report. For more information about how to deploy the action, see Tanium Console User Guide: Deploy a predefined action.
    - **Create Platform Package Deployment**: Select this option to deploy a platform action. For more information about how to deploy the action, see Tanium Console User Guide: Deploying actions in Console and Interact.
    - **Create Patch Deployment**: Select this option to deploy Patch actions. For more information about how to create a Patch deployment, see Tanium Patch User Guide: Create a deployment to install patches.
    - **Start Playbook**: Select this option to create a playbook run. For more information, see Tanium Automate User Guide: Run playbook from a report.

    After you select an option, the deployment configuration page opens in a new browser tab.

Work with drill-down reports

If a report or the **Explore Data** page shows a **Count** column, each **Count** value is a link that opens a drill-down report for the endpoints that are associated with the value. For example, if the **Patch Coverage Status** report indicates that some endpoints are **Missing Scan Results**, you can click their **Count** value to open a report that contains additional information for those endpoints. **ADI - Basic Inventory** is the default drill-down report but you can select a different report.

Select the drill-down report

1. From the Main menu, go to **Data > Settings > Drill-down Report**.
2. Select the **Report** and click **Save**.

    BEST PRACTICE

    Select a report that is in the **Reporting** content set to avoid possible user permission errors. Content set permissions in the roles that are assigned to a user determine which reports that user can open.

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Open a drill-down report

1. Open the report that contains data from the endpoints for which you want to see a drill-down report. For more information about View reports on page 48.

   You can also open a drill-down report through the **Explore Data** page after you Add source data on page 64.

2. Click the **Count** value for the endpoints that you want to analyze further.

   The drill-down report opens in a new browser tab.

Purge endpoint data

TDS caches the endpoint data that reports and dashboards show (see Data sources on page 13). To prevent reports and dashboards from showing data from certain endpoints, you can purge the cached data. For example, you might want to purge data that TDS collected from virtual desktop infrastructure (VDI) endpoints that no longer exist.



You require the **Data Collection API Identify Endpoint delete** permission to purge all data for endpoints and the **Data Collection Purge sensor** permission to delete data from specific sensors. The **Administrator** reserved role and Interact **Data Collection Operator** module role have these permissions.

Interact 3.1 or later is required to purge endpoint data

To purge the current and historical data of selected sensors from all endpoints, see Tanium Interact User Guide: Purge results for specific sensors.

Purge exclusions

Purge operations have the following exclusions:

- **Endpoint identification sensors**: If you select the **Purge cached endpoint data for selected sensors** option, the purge operation does not remove data from the following sensors relating to endpoint identification:
  - **Computer Name**
  - **Computer ID**
  - **Endpoint Fingerprint**
  - **Endpoint ID**
  - **EID First Seen**
  - **EID Last Seen**

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If you select the **Purge cached endpoint data** option, the purge applies to data from all the preceding sensors.

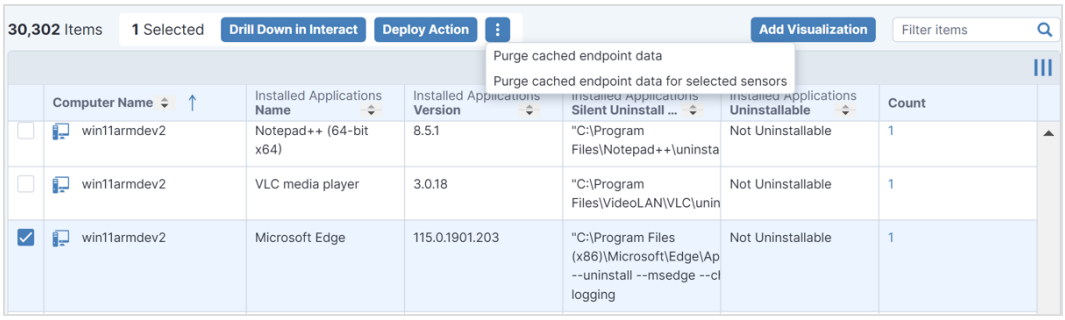
- **Sensors not present on endpoints**: Purge operations do not remove certain sensors that are not present on endpoints. For example, you cannot purge data that you see in the **Risk Score** column, which Reporting calculates without using an endpoint-side source.
- **Completed historical collections**: Purge operations do not remove historical data collections that completed before the purge. For example, dashboard panels that show endpoint counts for the week before the purge continue to include the purged endpoints, whereas panels that show current data exclude the endpoints.
- **Future collections**: Purge operations do not remove future data collections. The operations apply only to existing data in storage and do not stop TDS from collecting data from the endpoints if they are online during a future collection run. Alternatively, you can adjust report or dashboard filters to exclude data from endpoints that might come back online in the future. For more information about Working with Reporting reports on page 48 or (for dashboards) Filter Group on page 110 and Default Computer Group on page 111.

Purge data

1. Perform one of the following steps:
   - Open a report that includes the **Computer Name** source and includes the endpoints that provide the data to purge. If you are purging data only for selected sensors, the report must include those sensors as columns. For more information about View reports on page 48.
   - Open the **Explore Data** page and add the **Computer Name** source. If you are purging data only for selected sensors, add those sensors as columns. For more information about Add source data on page 64.
2. Select results (grid rows) from the endpoints that provide the data to purge.
3. Click More and select an option:
   - **Purge cached endpoint data**: The purge removes all data for the selected endpoints.
   - **Purge cached endpoint data for selected sensors**: The purge removes data only from the sensors (columns) in the report or in the grid on the **Explore Data** page.

     Reporting determines which data to purge based on the endpoints that you select and the sensors included in the results grid, regardless of how the data is flattened. If a sensor is included in the results, all the sensor data that applies to the selected endpoints is purged, even if the selection does not include all the rows for that data. In the following example, the grid has one row per application because the results are flattened by **Installed Applications**. Although the selection includes only the Microsoft Edge application, the purge applies to all the applications that apply to the selected endpoints.

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4. If any of the selected rows match multiple endpoints, clear the checkboxes of any that you want to exclude from the purge.
5. If you selected **Purge cached endpoint data for selected sensors**, review the list of sensors for which you are purging data.
6. Click **Purge** to proceed with the purge.

Delete reports

Deleting a report deletes the report configuration, but does not delete any data sources. To delete a report that supplies data to chart panels or action panels in dashboards, you must first either delete the dashboards (see Delete dashboards on page 142) or the panels that use the report data (see Edit dashboards on page 103).

> NOTE
>
> You cannot delete **Tanium Managed** reports.

1. From the Main menu, go to **Data > Reports**.
2. Perform one of the following steps based on whether you want to review a report before deleting it:
   - **No review**: Select the checkboxes of the reports to delete and click **Delete**.
   - **Review**: Click the **Report Name** to open it, review the report, and click **Delete**.

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Working with Reporting dashboards

In Reporting, a dashboard is a set of panels that enable you to visualize or summarize specific conditions in your environment, such as the levels of risk and compliance, and to deploy actions that change the conditions. For example, if a panel shows that certain endpoints have a vulnerability exposure, you can deploy an action that remediates the vulnerability. Each dashboard panel can contain a chart, text, and action deployment options. Chart panels are based on data, such as risk scores, from reports or module sources. A dashboard can have one or more collapsible sections to organize related panels.

You can also configure threshold-based custom alerts directly from chart panels in dashboards. When thresholds are met, notifications are sent through Tanium™ Guide or email. These alerts help surface critical changes and drive timely action without the need for constant manual monitoring. For more information, see Configure and manage custom alerts on page 124.

For more concept information about dashboards, including Tanium-managed and emerging issue dashboards, see Dashboards on page 19.

NOTE

Dashboard read permission is required to view and export dashboards, assign or unassign favorite status for dashboards, and deploy actions from a dashboard action panel. **Dashboard write** permission is required to create, edit, import, and delete dashboards. For the list of predefined roles that have these permissions, see Reporting solution permissions on page 34.

For more information about dashboards, including Tanium-managed and emerging issue dashboards, see Dashboards on page 19.

View dashboards

Perform the following steps to open a dashboard. You can access only dashboards that are in content sets for which you have Reporting **Dashboard read** permission.

1. From the Main menu, go to **Data > Dashboards**.

   The **Dashboards** page lists all the dashboards that you have permissions to access.

   NOTE

   The page shows basic settings for each dashboard, such as the **Dashboard Name** and **Content Set**. If a dashboard has a description, labels, and associated reports, click Expand beside the **Dashboard Name** to see these additional settings. To see the additional settings for all dashboards, click Expand in the column heading. Associated reports are reports that serve as a source for a dashboard chart panel (see Chart data sources on page 137) or action panel (see Message on page 119). For more information about other basic settings, see Dashboard settings on page 102.

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2. (Optional) Use the following filter options to facilitate finding specific dashboards if the grid is long. The grid shows only the dashboards that match all the filters that you specify.

Dashboard filter options

Filter by	Description
Labels	Select **Labels** to show only the dashboards to which those labels are assigned. TIP You can also use the **Labels** panel to add, edit, or delete labels. For more information, see Managing labels on page 165.
Favorites 	Use the **Show** buttons to toggle between showing **All** dashboards or only dashboards that are in your favorites list . TIP Click  beside a dashboard name to add the dashboard to your favorites list or click  to remove the dashboard from your favorites list.
Content Set	Select a content set to show only the dashboards that are assigned to that set.
Author (creator)	Select a user name to show only the dashboards that the user created or select one of the **Tanium Managed** options to show only the predefined dashboards that Tanium provides (see Tanium-managed dashboards on page 22).
Creation On 	Specify a range of dashboard creation dates by clicking the **Created on** and **to** calendar widgets .
Search by text... 	Enter an alphanumeric string in the **Search by text...**  field to filter by dashboard name or description.

3. (Optional) Select a **View as** option to determine how the page displays the dashboards:

Dashboard views

View option	Description
List view (default) 	List the dashboards with only text attributes, such as name, author (creator), and content set assignment.

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Dashboard views (continued)

View option	Description
Grid view 	Display the dashboards as a grid, with a row for each dashboard. Each row shows small previews of the dashboard charts. In grid view, the charts render faster if you use the search and filter controls to reduce the number of dashboards before clicking . The following widgets are specific to grid view: • : If a row of charts do not all fit in your browser view, you can navigate Forward  or Backward  in the row. • : By default, the grid is sorted  by **Dashboard Name** but you can select another attribute (such as **Content Set** assignment) in the dropdown list. • **Computer Group**: You can change the computer group filter for charts that are based on reports, not on module sources. You can apply the filter at the following levels: ◦ **All dashboards**: Select a group in the **Computer Group** dropdown list. ◦ **A specific dashboard chart**: In the chart, click Computer Group  and select a group. For more information about the computer groups that are available as filters, see Computer Group on page 98. • : This icon appears only if the optional **Description** setting is defined in the chart configuration. Hover over the icon  to show the description in a tooltip. • : Click  in a chart to add that chart to your favorites list or click  to remove the chart from your favorites list.

4. Click a **Dashboard Name** to open the dashboard. You can then filter the dashboard, manage the dashboard (for example, edit its contents), and deploy actions from it. For more information, see Use a dashboard on page 95.

If dashboard panels include endpoint data that is no longer relevant, you can purge the data that Tanium Data Service (TDS) currently stores for those endpoints. For more information, see Purge endpoint data on page 89.

To distinguish among dashboards that have the same name, see Identify dashboards that have duplicate names on page 95.

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Identify dashboards that have duplicate names

A Tanium environment might have multiple dashboards with the same name. This might happen if you Import dashboards on page 132 from another environment. Use the following attributes to distinguish among dashboards that have the same name:

- **Author**: Dashboards with the same name often have different authors (creators). To see the author of a dashboard, go to the **Data > Dashboards** page and check the **Author** column. Alternatively, you can open a dashboard and click Expand beside the dashboard name to view its basic settings.
- **Dashboard ID**: Each dashboard has a unique ID. To see the ID, open a dashboard and check the URL field in your browser for the `id` value, such as: `https://example.com/ui/reporting/dashboards/dashboard?id=`**`fce5f7e7-09d4-4142-90da-86b73b04682b`**.

Use a dashboard

After you open a dashboard (see View dashboards on page 92), you can use widgets on the page to perform the tasks listed in table Using a dashboard on page 95 through the widgets described in table Dashboard widgets on page 97.

Using a dashboard

Task	Options
Filter chart data	Use the following widgets to filter the data in charts: • Computer Group on page 98 • Timeframe on page 99
Edit chart presentation	Use the following widgets to control how a dashboard presents charts: • Refresh on page 99 • Favorite charts on page 101 TIP To change the chart contents (data), size, or location, see Edit dashboards on page 103.

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Using a dashboard (continued)

Task	Options
Manage a dashboard	Use the following widgets to manage a dashboard: •  <Dashboard name> on page 97    (basic dashboard settings and favorite status) • Export on page 97 • Clone on page 97 • Edit on page 97 dashboard • Edit section on page 99  • Investigate disabled sources on page 99 • Delete on page 97
Drill down into chart data	Use the following widgets to open the report that is the source for a dashboard panel: • <Chart name> on page 100 • Count on page 100
Manage endpoints	Use the following widgets to manage the endpoints that provide data to dashboard panels: • Deploy Action on page 101

The following table lists the widgets in a dashboard in top-to-bottom and left-to-right order.

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Dashboard widgets

Task	Description
<Dashboard name> 	Click Expand beside the dashboard name to show the following dashboard settings: • **Description**, if the dashboard has one. • **Content Set** assignment. • **Auditing information**, such as who created the dashboard (**Author**), who last modified the dashboard, and when. • **Reports** that the dashboard uses for chart panels or action panels. Each report name is a link that opens the report. • **Labels** assignments. Each label name is a link that opens the **Dashboards** page with the label selected as a filter in the **Labels** section. Click Edit beside the dashboard name to edit the name, description, content set assignment, or label assignments. For more information about these settings, see Dashboard settings on page 102. NOTE For **Tanium Managed** dashboards, the only allowed edits are assigning a different content set and adding labels. Click the favorite toggle beside the dashboard name to include the dashboard in the favorites list or exclude it from the list. To filter the **Data > Dashboards** page to show only your favorite dashboards, see Favorites on page 93.
Export	To export the dashboard as a file to the downloads folder of your local browser, click **Export** and select **Dashboard as HTML** or **Dashboard Definition as JSON**. For more information, see Export dashboards on page 130. To export dashboards in HTML format to a destination other than the downloads folder of your local browser, see Export dashboards through Tanium Connect on page 131. To import dashboard configurations from a JSON file into another Tanium Server, see Import dashboards on page 132.
Edit	This button appears only for custom dashboards that are in a content set for which you have **Dashboard write** permission. Click **Edit** and perform the steps under Edit dashboards on page 103 to modify the dashboard sections, charts, and data.
Delete	This button appears only for custom dashboards that are in a content set for which you have **Dashboard write** permission. Click **Delete** and perform the steps under Delete dashboards on page 142.
Clone	This button appears only if you have **Dashboard write** permission. Click **Clone** and perform the steps under Clone dashboards on page 102.

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Dashboard widgets (continued)

Task	Description
Computer Group 	The following options are available to filter report-based charts by computer group. The options include only computer management groups that are selected for collection in Reporting (see Select computer groups for data collection on page 46) and that you have RBAC permission to access. • **Dashboard-level group** Select a **Computer Group** in the dropdown list if you want all the charts to show data from only that group. The **Defaults** option specifies that no computer group applies at the dashboard level. Instead, each chart uses its own Default Computer Group on page 111 configuration. If you select any other option (a specific computer group), it overrides the chart-specific default groups. Reporting saves your selection without opening the dashboard in edit mode and requiring you to manually save. • **Chart-level group** To override the dashboard-level **Computer Group** and the chart-specific **Default Group** for a single chart, click Computer Group  within the chart and select a group. The icon shows a yellow disk  if the **Default Group** has an override at the dashboard or chart level. You cannot save the chart-level override; the next time you open the dashboard, the chart shows data for the dashboard-level **Computer Group** or, if the latter is set to **Defaults**, for the chart-specific **Default Group**. You can select one of the following types of **Computer Group** at the dashboard-level and chart-level: •  **Historical Collection Enabled**: This list includes computer management groups that are selected for collection in Reporting (see Select computer groups for data collection on page 46). You can see both historical and current data for these groups. •  **Current Data Only**: This list includes groups that are not selected for collection in Reporting but have membership based on sensors that are registered with TDS. The groups must be computer management groups with filtering enabled or they must be filter groups. You can see only current data for these groups, not historical data. To check which sensors a group uses, see its **Expression**, as described in Tanium Console User Guide: View filter group details. To check if a sensor is registered, and to register it if necessary, see Tanium Interact User Guide: Managing Tanium Data Service (TDS). You require RBAC permissions for computer management groups and filter groups to see them in the dropdown list. For more information, see Tanium Console User Guide: Managing RBAC.  NOTE Computer group filters do not apply to dashboard charts that are based on Module sources on page 14. If a chart configuration includes a Filter Group on page 110, it applies regardless of dashboard-level or chart-level computer group filters. For example, if the **Filter Group** for a chart is **All Windows** and you set the dashboard-level **Computer Group** to **All Computers**, the chart still shows data only from Windows endpoints. If charts do not show data from certain endpoints, verify that the endpoints are members of the selected computer group. For more information, see Tanium Console User Guide: View filter group details.

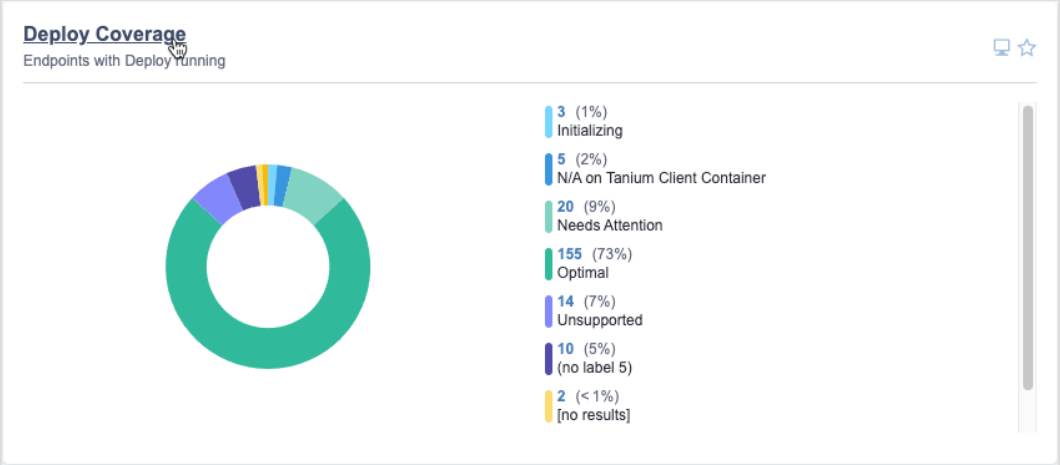
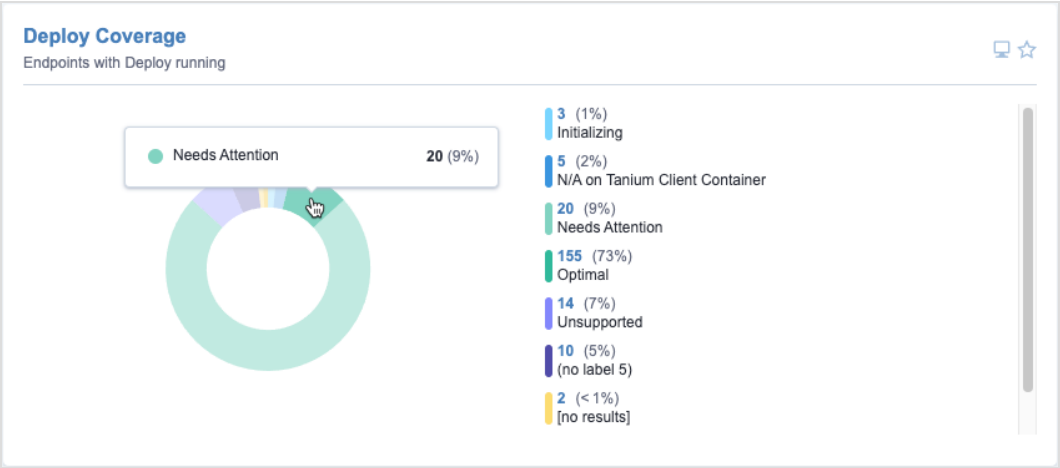
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Dashboard widgets (continued)

Task	Description
Timeframe	Select a **Timeframe** if you want all the charts to show data only from a specific date or date range. Reporting saves your selection without opening the dashboard in edit mode and requiring you to manually save. The **Defaults** option specifies that no timeframe applies at the dashboard level. Instead, each chart uses its own Date/Timeframe on page 114 configuration. If you select any other option (a specific timeframe), it overrides the chart-specific date/timeframe. If you select a Computer Group on page 98 that is not selected for collection with Reporting, the only available **Timeframe** is **Current**. Based on the chart type, you can open a tooltip that indicates the date/time when Reporting ran a collection for the data: • **Historical charts**: In area charts and line charts, hover over a data point. • **One-day charts**: In other chart types, hover over the chart name. For more information about the **Timeframe** options, see Date options on page 187. For more information about how Reporting collects data for a timeframe, see Overview of historical data collection for report-based charts on page 137. NOTE Some charts might not contain data for certain time frames. For more information, see Data is unavailable for timeframe on page 174.
 Refresh	By default, a dashboard updates every two minutes when the browser tab is open. In the dashboard header, click Refresh to manually refresh all charts on the dashboard. To change the automatic refresh interval, click and either select an interval or select **Pause auto refresh** to stop automatic refreshes. Reporting saves your selection without opening the dashboard in edit mode and requiring you to manually save.
 (in sections) Edit section	This icon appears in each section, but only for custom dashboards that are in a content set for which you have **Dashboard write** permission. Click the icon and select an option to add panels to the section, change its layout, or delete it. For more information, see Edit dashboards on page 103.
(in charts) Investigate disabled sources	The Disabled icon indicates collection is disabled for the data source of a chart, in which case the chart shows only the current data, not historical data. Users who are assigned the **Administrator** reserved role can click the icon to open the **Source Details** page. For more information, see Data collection failures on page 175.

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Dashboard widgets (continued)

Task	Description
<Chart name> Count	Click the name of a chart panel (**Deploy Coverage** in the following example) or the **Count** (number charts only) to open the report that provides the chart data. The report opens in a new browser tab.  Clicking a data point in the chart (**Needs Attention** in the following example) opens the report with that data point applied as a filter.  NOTE When you click a data point from a past date/time in a historical chart, the report that opens shows the current data, not the past data.

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Dashboard widgets (continued)

Task	Description
 (in charts) Favorite charts	Click the favorite toggle include ☆ a chart in the favorites list or exclude ★ it from the list. You can filter the **Data > Dashboards** page in Grid view to show only your favorite charts.
 (in charts) Custom Alerts	After you configure a custom alert, the Custom Alerts icon appears to indicate that an alert is configured for the chart panel but not active. If the threshold condition is met or exceeded, the Active Custom Alerts icon appears instead. You can hover over the icon to view alert details, or open the alert configuration to edit or manage existing alerts. To create or manage alerts, open the dashboard in edit mode. For more information, see Configure and manage custom alerts on page 124.
<Action label> or Deploy Action	(Action panels only) If an action panel indicates an issue on endpoints that requires attention and provides action options, you can address the issue by deploying an action to the endpoints. If only one action is available, the panel provides a button with the action label. If multiple actions are available, the panel provides a **Deploy Action or Run Playbook** dropdown list that lists each action. Clicking the button or selecting a dropdown list option starts the action deployment workflow, as described in Tanium Console User Guide: Deploying actions in Console and Interact. For the role permissions to deploy actions, see Tanium Console User Guide: Deploy actions. Action panels are a feature of emerging issue dashboards that Tanium manages (see Emerging issue dashboards on page 25) but custom dashboards can also have action panels (see Add action panels on page 118). NOTE An action panel that has the icon/text combination **Recommended Action** provides an action that Tanium recommends for addressing the issue that the dashboard describes. An action panel does not include the Tanium icon if your organization recommends the action.

Create dashboards

You have two options for creating dashboards:

- Create new dashboards on page 102
- Clone dashboards on page 102: This is a quicker workflow if an existing dashboard has settings, sections, and panels that are similar to what you want for the new dashboard.

TIP

Tanium-managed dashboards might provide the information that you want without the need to create a custom dashboard. For more information, see Tanium-managed dashboards on page 22.

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Create new dashboards

1. From the Main menu, go to **Data > Dashboards**.
2. Click **Create Dashboard** and configure the following settings:

   Dashboard settings

Setting	Decription
Dashboard Name	Enter a name of up to 255 characters to identify the dashboard.
Content Set	Assign the dashboard to a **Content Set**. The dropdown list shows only the content sets for which you have **Dashboard write** permission. Only users who have **Dashboard read** permission for the content set can access the dashboard.
Description (optional)	Enter a description for other users to understand the purpose and contents of the dashboard.
Labels (optional)	Assign one or more labels to use when filtering the **Dashboards** page by labels. If the list of labels is long, use the search field within the dropdown list to quickly find labels. The search field shows each selected label as a pill with an **X**. Click **X** within a pill to unassign that label or click the **X** to the right of all the pills to unassign all labels. To simultaneously create and assign a label, type its name in the **Labels** search field and select **Create <_name_>** in the dropdown list. For more information on labels, see Managing labels on page 165.

3. Click **Create**. Reporting saves the dashboard and opens it in edit mode.
4. (Optional) Select the **Computer Group** and **Timeframe** filters. For more information, see Computer Group on page 98 and Timeframe on page 99.
5. Perform the following tasks to add sections and panels to the dashboard, and then click **Save**:
   - Add sections on page 105
   - Add chart panels on page 106
   - Add action panels on page 118
   - Add text panels on page 120

Clone dashboards

1. From the Main menu, go to **Data > Dashboards**.
2. Click the **Dashboard Name** of the dashboard with settings and contents that are similar to dashboard you want to create.
3. Click **Clone**, edit the settings (see Dashboard settings on page 102), and click **Save**. Reporting saves the dashboard and opens it in edit mode.
4. (Optional) Select the **Computer Group** and **Timeframe** filters. For more information, see Computer Group on page 98 and

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Timeframe on page 99.

5. Edit the sections and panels as necessary (see Edit dashboards on page 103), and then click **Save**.

Edit dashboards

Limitations when editing dashboard attributes

The type of dashboard determines which attributes you can edit.

Limitations for dashboard edits

Limitation	Description
Custom dashboards	You can edit all the attributes of a custom dashboard, including sections, panels, filters, and basic settings.
Tanium-managed dashboards	The only edits you can make to Tanium-managed dashboards are: • Add labels. • Change the content set assignment if the dashboards are not locked. When you open a dashboard and Edit the basic Dashboard settings on page 102, a lock icon appears next to the **Content Set** if the dashboard is locked and the content set assignment cannot be changed. • Change the favorites assignment /. You can edit filters while you view the dashboards but you cannot save the edits. To create a dashboard that resembles a Tanium-managed dashboard but with slightly different settings, see Clone dashboards on page 102. For more information about Tanium-managed dashboards, see Tanium-managed dashboards on page 22. NOTE If you remove Tanium-assigned labels from a Tanium-managed dashboard, those labels are restored the next time you update or re-import Reporting. However, if you remove labels that another user assigned to a Tanium-managed dashboard, the update or re-import does not reassign them.

Edit a dashboard

Perform the following steps to modify a dashboard configuration.

TIP To edit the label assignments of multiple dashboards in a single operation, see Manage label assignments for dashboards on page 168.

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1. From the Main menu, go to **Data > Dashboards** and click the **Dashboard Name** of the dashboard that you want to edit.
2. To edit the dashboard name, description, content set assignment, or label assignments, click Edit beside the name, update the settings, and click **Save**. For more information about these settings, see Dashboard settings on page 102.
3. To change the favorite status of a dashboard, click the toggle beside the dashboard name to include the dashboard in the favorites list or exclude it from the list.

   The remaining steps apply only to custom dashboards.
4. To edit how the dashboard presents chart data, see Edit chart presentation on page 95.
5. To edit the chart filters, see Filter chart data on page 95.
6. To edit dashboard sections and panels, click **Edit**, and perform the corresponding Dashboard editing tasks on page 104.

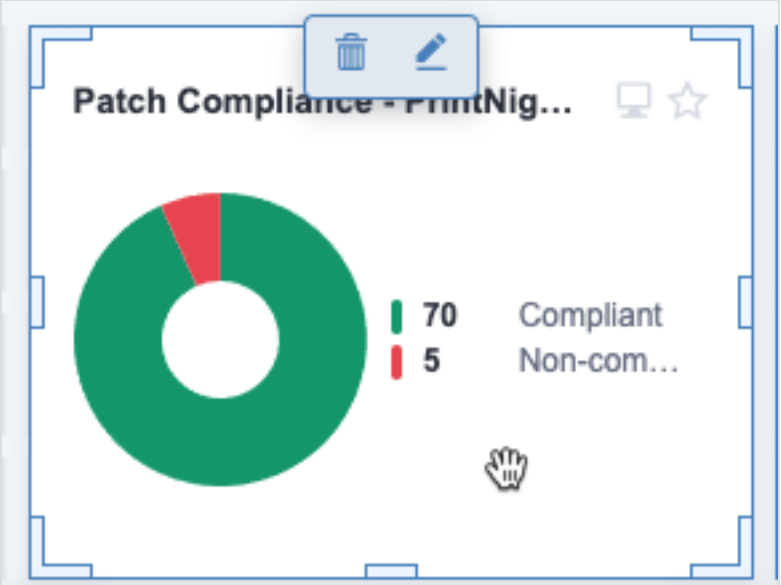
> NOTE
>
> The dashboard editor contains a grid layout to assist when you resize and move panels within the grid. If you resize or move panels in a section, the section might automatically resize vertically to match the largest height of panels.

Dashboard editing tasks

Option	Description
Add sections	Add sections to the dashboard. For more information, see Add sections on page 105.
Edit section names	Type over the existing name for a section to rename it. Section names can have up to 255 characters.
Move sections	Select **Reorder Sections**, and then click and drag sections in the desired order.
Delete sections	Click **Delete** beside the section name to delete the section and any panels in it.
Add panels	Add one or more panels to each section: • Add chart panels on page 106 • Add action panels on page 118 • Add text panels on page 120
Edit panels	Click Edit at the top of the panel and configure the settings just as you do when you Add panels on page 104.
Clone panels	Click Clone at the top of the panel and configure the settings just as you do when you Add panels on page 104.

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Dashboard editing tasks (continued)

Option	Description
Move panels	Click the blank space in a panel, and then drag the panel to the desired location. When you release the mouse button, the panel snaps to the nearest coordinates on the design grid. After you move the panel, the section that contains it might automatically resize vertically to match the largest height of panels. 
Resize panels	Click and drag any panel corner or panel edge midpoint. When you release the mouse button, the panel snaps to the nearest coordinates on the design grid. The panel size determine how much data the panel shows. To show more data, enlarge the panel. After you resize the panel, the section that contains it might automatically resize vertically to match the largest height of panels.
Delete panels	Click Delete at the top of the panel.

7. Click **Save** when you finish editing the dashboard.

IMPORTANT Any changes that you make to the dashboard are not saved until you click **Save**.

Add sections

In dashboards, a section is a collapsible division that groups related panels. A dashboard can have multiple sections, and each section can contain multiple panels. A dashboard requires at least one section. If you add a panel to a dashboard without a section, Reporting automatically creates a section for the panel.

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1. Perform one of the following steps to add a section to an existing or new dashboard:
    - **Existing dashboard**: From the Main menu, go to **Data > Dashboards**, click the **Dashboard Name**, and click **Edit**.
    - **New dashboard**: Clone an existing dashboard or create one from scratch. The new dashboard automatically opens in edit mode. For more information, see Create dashboards on page 101.
2. Select **Add > Add Section**.
   Reporting adds the section to the bottom of the dashboard.

   To move the section, select **Reorder Sections**, and then click and drag sections into the desired order.
3. Go to the bottom of the dashboard to find the new section.
4. (Optional) Enter a name of up to 255 characters for the section.
5. Add one or more panels to the section:
    - Add chart panels on page 106
    - Add action panels on page 118
    - Add text panels on page 120
6. Click **Save** when you finish editing the dashboard.

Add chart panels

A chart panel on a dashboard contains a chart that helps users to visualize data from a report or a module source. The report or module source that you want to use for the panel must exist before you add the panel to a dashboard.

To verify that a report exists, see View reports on page 48. To create a new report for the chart panel, see Explore data and create reports on page 63. The report configuration does not require its own chart and, if it has one, the chart settings in the report have no effect on the chart that you configure for the dashboard.

Tanium solutions provide module sources and therefore the available sources depend on which solutions you have imported. For more information, see Module sources on page 14.

For example chart panels, see Chart types on page 180.

Perform the following tasks to add a chart panel to a dashboard.

1. Select the panel location on page 107
2. Configure basic chart settings on page 107
3. Configure source data filters on page 109
4. Configure default display settings on page 110

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5. Configure the chart type and advanced settings on page 111
6. (Optional) Configure custom alerts on page 117
7. Preview and save the chart panel on page 117

Select the panel location

1. Perform one of the following steps to add a panel to an existing or new dashboard:
    - **Existing dashboard**: From the Main menu, go to **Data > Dashboards**, click the **Dashboard Name**, and click **Edit**.
    - **New dashboard**: Clone an existing dashboard or create one from scratch. The new dashboard automatically opens in edit mode. For more information, see Create dashboards on page 101.
2. Perform one of the following steps depending on the dashboard section where you want to add the panel:
    - **Bottom section**: At the top of the dashboard, select **Add > Add Chart Panel**.
    - **Any other section**: In the section where you want the panel, select **Add Panel > Add Chart Panel**.

Configure basic chart settings

Configure the following panel settings in the **Add Panel** dialog that opens when you Select the panel location on page 107. You configure the same settings in the **Edit Panel** dialog if you edit an existing panel.



Editing basic settings for a report-based chart has an impact on historical data collection for that chart, as described in Chart data sources on page 137.

Panel settings: basic

Setting	Description
Data Source	The type of source for the chart data. You can select: • **Report**: Use data from a Reporting report • **Module Source**: Use data from a Tanium solution Module sources on page 14 appear only if you have **Reporting Metrics Source read** permission on one or more content sets for module sources. Otherwise, you must select a report as the source in the **Select Report** dropdown list.
Select Report (Report sources only)	Select the report from which to retrieve information. This dropdown list shows only the reports that are in content sets for which you have **Report read** permission. If multiple reports have the same name, the list appends `(Author: <user name>, ID:<report identifier>)` to the duplicate names. To match these names with specific reports, see Identify reports that have duplicate names on page 49.
Panel Name	Enter a name of up to 255 characters as a heading for the panel.
Panel Description	Enter a description to help other users understand the purpose and contents of the panel.

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Panel settings: basic (continued)

Setting	Description
Group By Column (Report sources only)	(Optional) Select one or more report columns by which to group data on the chart. Reporting performs aggregations for each group that you select. The combined values of the selected groups appear as labels on the chart. Reporting automatically populates the dropdown list with the report columns. If you do not select an option, Reporting shows results as a single aggregate.
Aggregate (Report sources only)	Aggregation summarizes the data in each group. The available options depend on the selected chart type. For example, numeric aggregations like sum are only available with numeric columns. Aggregation options: • **Total Count**: Display the sum of all values in the Count column. Reporting automatically aggregates the results by **Total Count** if you do not select an **Aggregate**. • ***<column name>* Count**: Display the total number of items for the column. • ***<column name>* Unique Count**: Display the total distinct items for the column. • **Row Count**: Display the number of rows only when no **Group By Column** is selected, and the **Group Tanium Errors** toggle is off. • **Percentage**: (Number charts only) Display the data as a percentage of the selected group divided by the total of all groups in the source column. For example, consider a column that contains 100 rows: 75 rows contain **True**, 20 rows contain **False**, and 5 rows contain **N/A**. If you aggregate by percentage and select **False** for the **Group**, the percentage that appears is 20% based on the formula (20 / (75+20+5)) * 100. This option is only available for number charts. • ***<column name>* [Average | Max | Min | Sum]**: If the report contains numeric columns, you can also aggregate the data in each group based on a numeric column. The following options are available for each numeric column: ◦ **Average**: Display the total value of all items in the group (the **Sum**) divided by the number of items in the group. ◦ **Max:** Display the maximum item value in the group. ◦ **Min**: Display the minimum item value in the group. ◦ **Sum**: Display the total value of all items in the group.

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Panel settings: basic (continued)

Setting	Description
Group Tanium Errors (Report sources only)	This option is enabled by default but applies only if you select a **Group By Column**. For the selected column, **Group Tanium Errors** groups all the results that match one of the following errors: • `TSE-Error: <error code or message>` • `current result unavailable` • `results currently unavailable` • `too many results` • `hash collision detected` For more information about these errors, see Tanium Console User Guide: Troubleshoot question results issues. If you clear **Group By Column**, the panel shows the errors ungrouped by type.
Select Module Source (Module sources only)	Select the module source from which to retrieve information. This dropdown list shows only the module sources that are in content sets for which you have **Reporting Metrics Source read** permission.
Value (Module sources only)	For module sources that contain multiple calculated values, select the value to display in the panel.
Group By (Module sources only)	Select how to group data in the panel. This setting is only available for module sources that contain fields by which to group data.

Configure source data filters

After you Configure basic chart settings on page 107, you can add optional **Advanced Filters** to filter the source data by a filter group, a source condition, or both. If you add both filters, data must match both filters to appear in the chart.



Editing the **Filter Group** or **Source** conditions for a report-based chart has an impact on historical data collection for that chart, as described in Chart data sources on page 137.

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Panel settings: filters

Setting	Description
Filter Group	The chart shows results only from the selected filter group. Reporting refreshes the chart preview based on your selection. If the list of filter groups is long, use the typeahead within the **Filter Group** dropdown list to quickly find filter groups. NOTE The **Filter Group** dropdown list contains only the groups that are assigned to a content set for which your user account has **Filter Group read** permission. The filter groups do not have to be selected for collection in Reporting. For more information about filter groups, see Tanium Console User Guide: Managing filter groups. For more information about configuring and assigning role permissions, see Tanium Console User Guide: Managing roles.
Source	Specify a source condition that report data must match. For example, specify the following settings to show data from endpoints that have a risk score greater than 100: • Source: **Tanium Risk Score** • Column: **Risk Score** • Operator: **is greater than** • Value: **100**

Configure default display settings

Configure the following default display settings for the chart data.

Panel settings: default display

Setting	Description
Timeframe	Select a timeframe from which you want the panel to show data. The default is **Current**. For more information, see Date options on page 187.

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Panel settings: default display (continued)

Setting	Description
Default Computer Group	This option appears only if you selected **Report** as the source type (see Panel settings: basic on page 107). Select the default computer group for which to show data in the chart. The options include only computer management groups that are selected for collection in Reporting (see Select computer groups for data collection on page 46) and that you have RBAC permission to access. To show data from all endpoints, select **All Computers**. You can select one of the following types of computer groups: • **Historical Collection Enabled**: This list includes computer management groups that are selected for collection in Reporting (see Select computer groups for data collection on page 46). You can see both historical and current data for these groups. • **Current Data Only**: This list includes filter groups that are not selected for collection in Reporting but have membership based on sensors that are registered with TDS. You can see only current data for these groups, not historical data. To check which sensors a group uses, see its **Expression**, as described in Tanium Console User Guide: View filter group details. To check if a sensor is registered, and to register it if necessary, see Tanium Interact User Guide: Managing Tanium Data Service (TDS). You require RBAC permissions for computer management groups and filter groups to see them in the dropdown list. See Tanium Console User Guide: Managing RBAC. BEST PRACTICE When you view a dashboard, you have the option to select a dashboard-level Computer Group on page 98 that overrides the chart-specific **Default Group**. For example, if you set the **Default Group** to **All Windows**, a user can open the dashboard and set the dashboard-level **Computer Group** to **All Windows Workstations** to make the chart show data only from workstations. However, users might select a computer group that overrides your intended use for the chart, such as selecting **All Mac** for a dashboard with charts that are relevant only for Windows endpoints. To avoid such overrides, set the **Default Group** to **All Computers** and select a chart-specific Filter Group on page 110 to filter the results. The dashboard-level **Computer Group** does not override the **Filter Group**.

Configure the chart type and advanced settings

After you Configure basic chart settings on page 107, select the chart type and configure the settings that control its presentation. The available settings depend on the selected report and chart type.

1. Select one of the following Chart types on page 180:
   - Vertical Bar Chart
   - Donut Chart
   - Number Chart
   - Line Chart

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 Area Chart

 Table Chart

After you select a type, the **Preview** pane shows the chart at different sizes. You can resize the chart after you add the chart to the dashboard, as described in Resize panels on page 105.

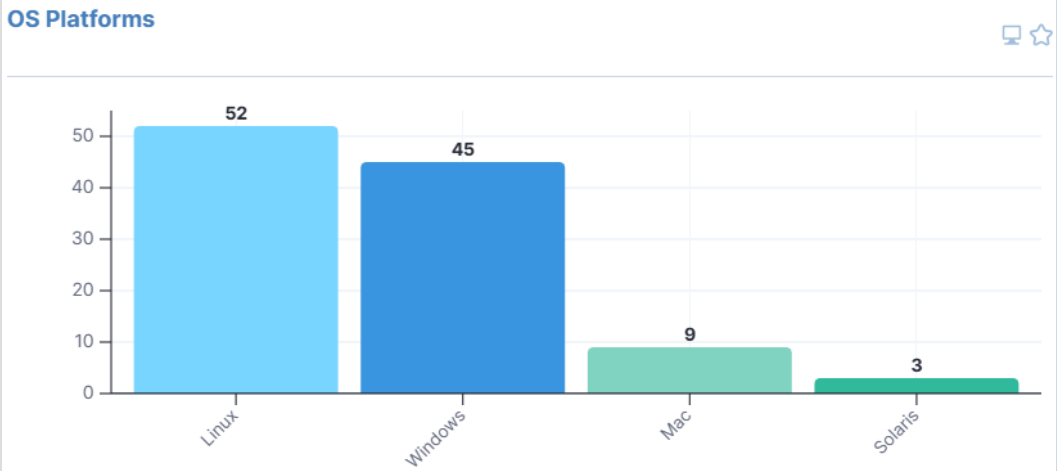
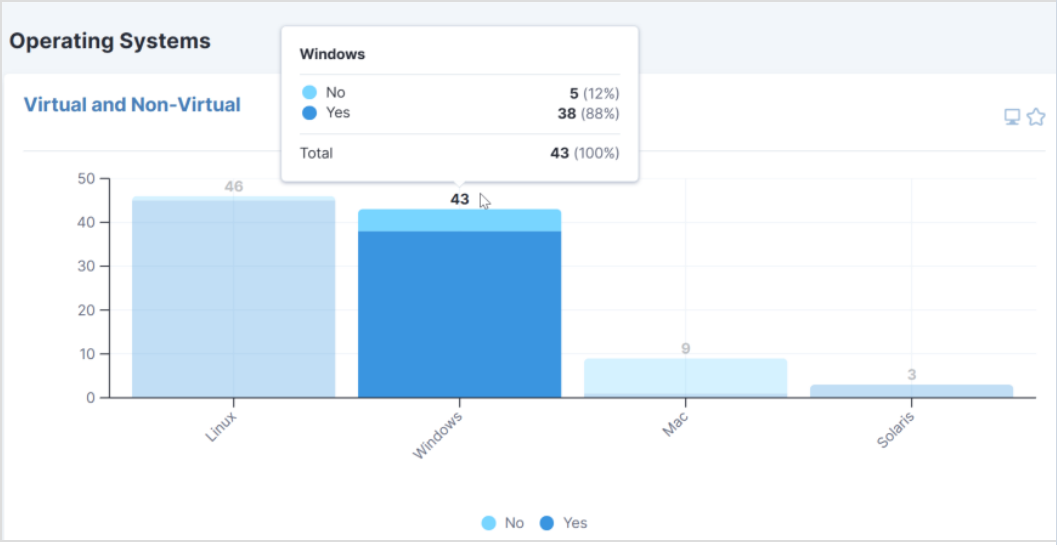
2. Customize the advanced panel settings.

Panel settings: advanced

Setting	Description
Group (Number charts only)	Select the group value to show for the chart.

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Panel settings: advanced (continued)

Setting	Description
Display (Vertical bar charts only)	**Display** options appear only if you selected **Report** as the source type and the report that you selected has multiple data sources (see Panel settings: basic on page 107). Otherwise, bar charts automatically use the **Standard** option. • **Standard**: Each bar in the chart represents a unique result from the column that you selected in **Group By Column**. For example, if the **Group By Column** is **OS Platform**, the chart shows a bar for each platform in your environment, such as Linux, Windows, macOS, and Solaris.  • **Stacked**: Each bar in the chart represents a unique result from the **Group By Column** and, within each bar, one or more segments represent unique results from the column that you select in **Stack by Column**. For example, if the **Group By Column** is **OS Platform**, the **Stack by Column** is **Is Virtual**, and the **Segment Values** (results) are **Yes** and **No**, then each bar has up to two segments: one for **Yes** results and one for **No** results. In the following example, the bar for the Solaris platform has only a **Yes** segment because all the Solaris endpoints that returned results for the chart are virtual.  Define the following settings for a stacked bar chart: ◦ **Stack by Column**: Select the column that provides the results that show in the segments of each bar. ◦ **Segment Values**: Select up to 10 unique results from the **Stack by Column**. Each unique result shows as one segment in each bar. To specify a future anticipated result that is not yet present in the **Stack by Column**, type

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Panel settings: advanced (continued)

Setting	Description
Date/Timeframe	Select a **Timeframe** (date range) for historical charts or a single **Date** for one-day charts. For more information about the date options for these chart types, see Date options on page 187. IMPORTANT Reporting starts collecting data for charts when you save the dashboard. Historical charts show a **Collecting initial data** message until the data exists. The chart preview shows any available data so you can see how the chart appears. You might lose historical data if you change certain chart settings. For more information, see Overview of historical data collection for report-based charts on page 137. NOTE After you save the dashboard and view it, you can select a dashboard-level **Timeframe** that overrides the **Date** or **Timeframe** in the chart configuration. For more information, see Timeframe on page 99.
Subtitle (Number charts only)	Enter text to display under the value in the number chart.
Timeframe Label (Number and donut charts only)	Enter text to display under the chart. The default value matches the **Date** value.
Sort	Select a **Group By Column** or **Aggregate** option by which to sort items in the chart. Click for ascending order (low to high) or for descending order (high to low). For example, if you select **CVSS v3 Severity** as the **Group By Column**, you can sort by severity level: critical, high, medium, and low. **Count** is the default sorting option, and it is the only option if you do not select a **Group By Column**.
Max Results	Select a predefined maximum number of items to show in the chart. The maximum is 100. (Table charts only) Select a predefined maximum number of items to show in the chart or enter a number up to 500. NOTE When you configure a custom alert, a note appears in the alert chart preview if some results are not accounted for because of the max results configuration. The note indicates what percentage of the total results are included in the alert chart preview. For example, a note indicates that the shown values represent 75% of the total, while the remaining 25% comes from 10 additional values not shown. For more information about custom alerts, see Configure and manage custom alerts on page 124.

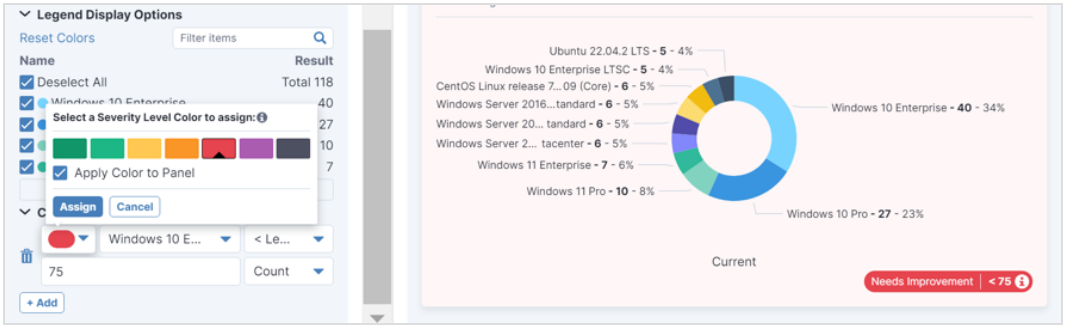
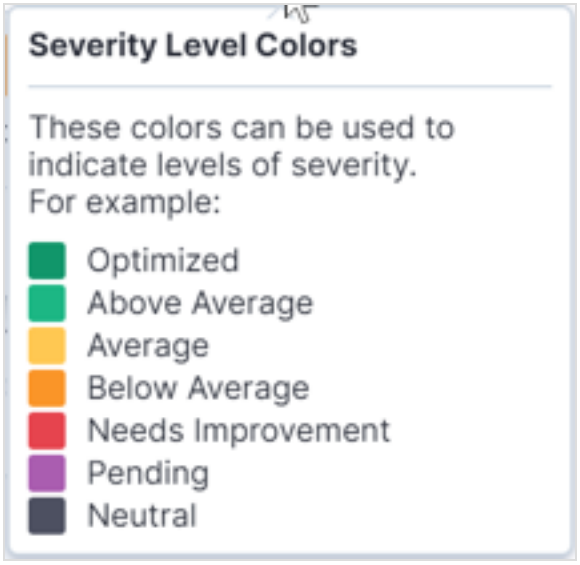
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Panel settings: advanced (continued)

Setting	Description
Scale (Vertical bar, area, or line charts only)	Select how to scale values on the y-axis: • **Linear**: Use consistent values on the y-axis. For example, if the minimum data point on a chart is 1, and the maximum data point is 100, the y-axis values would be 0, 20, 40, 60, 80, and 100. • **Logarithmic**: Scale the y-axis on an exponential basis. Use this option for charts that contain a large range of data points.
Value Format	Select a format for the chart values if the **Aggregate** is set to a percentage or numeric column value: • **Percent**: Adds % as a suffix to the values • **None**: No suffix is added The format selection controls only the value unit that appears in the chart and does not change the actual value. The format option is not available for table charts or charts in which the **Aggregate** is set to **Count**.
X-Axis Label	Enter a label to display horizontally under the chart. This option only displays for chart types that use axis labels.
Y-Axis Label	Enter a label to display vertically to the left of the chart. This option only displays for chart types that use axis labels.
Trend Indicator (Number charts only)	Select to hide or show a trend indicator on the chart. When you select **Show**, select the direction of the indicator, and the date to compare with the current value. If the value that you want to compare against does not exist, the trend indicator does not appear on the panel.
Legend Display Options	Use this section to customize the items that appear in the chart. • **Exclude items**: Clear the checkbox for an item to exclude that item from the chart. • **Customize colors**: Click the colored disk beside an item to change the color that the chart uses for the item. Multiple items can use the same color.

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Panel settings: advanced (continued)

Setting	Description
Conditional Formatting	Conditional formatting helps users identify issues that need attention. If chart data matches the specified threshold, the chart shows a label and (optionally) background color that indicates the issue severity. In the following example, risk scores match the **Needs Improvement** threshold:  If you add multiple conditions to a chart, Reporting evaluates them in descending order: it applies the first condition that matches the corresponding threshold. If you specify exclusions in the **Legend Display Options**, Reporting still evaluates the excluded items and applies conditional formatting if they match thresholds. To add conditional formatting: a. Expand the **Conditional Formatting** section and click **+ Add**. b. Click the severity color dropdown list and select a severity level for the label to show:  c. Select **Apply Color to Panel** to apply the color to the chart background or clear the checkbox to retain the default background color. d. Click **Assign** to apply your selections. e. In the **Select Group** dropdown list, select the result on which to base the condition. Reporting populates the dropdown list based on the **Group By Column** setting. f. Select an **Operator** (such as **< Less Than**) for matching the condition.

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(Optional) Configure custom alerts

You can configure threshold-based custom alerts directly from chart panels in dashboards. When thresholds are met, notifications are sent through Guide or email. These alerts help surface critical changes and drive timely action without the need for constant manual monitoring. You can configure custom alerts when you add a chart panel or configure them later. For more information, see Configure and manage custom alerts on page 124.

Preview and save the chart panel

After you configure chart panel settings in the **Edit Chart Panel** dialog, preview the panel, make any necessary edits (see the subtasks in Add chart panels on page 106), and then save the panel.

1. Verify that the chart and text appear as you expect in the **Preview** pane.
2. (Optional) Click **Show Underlying Report Data** to review the report data for the chart within the **Preview** pane. Viewing the data might help you understand any anomalies in the chart. To show the data in a larger viewing area, click **View Report** to open the report in a new browser tab.

   The report data view in the **Preview** pane provides many of the same filtering options (such as **Filter Group**) as those in an actual report (see Filter data on page 50). However, your filtering selections affect only the data in the **Preview** pane and are not saved to the report or panel when you save the panel.
3. Click **Done** to save the panel.
4. (Optional) Change the panel size and location as described in Move panels on page 105 and Resize panels on page 105.
5. Click **Save and Finish** to save the dashboard.

Preview and save the chart panel

After you configure chart panel settings in the **Add/Edit Panel** dialog, preview the panel, make any necessary edits (see the subtasks in Add chart panels on page 106), and then save the panel.

1. Verify that the chart and text appear as you expect in the **Preview** pane.
2. (Optional) Click **Show Underlying Report Data** to review the report data for the chart within the **Preview** pane. Viewing the data might help you understand any anomalies in the chart. To show the data in a larger viewing area, click **View Report** to open the report in a new browser tab.

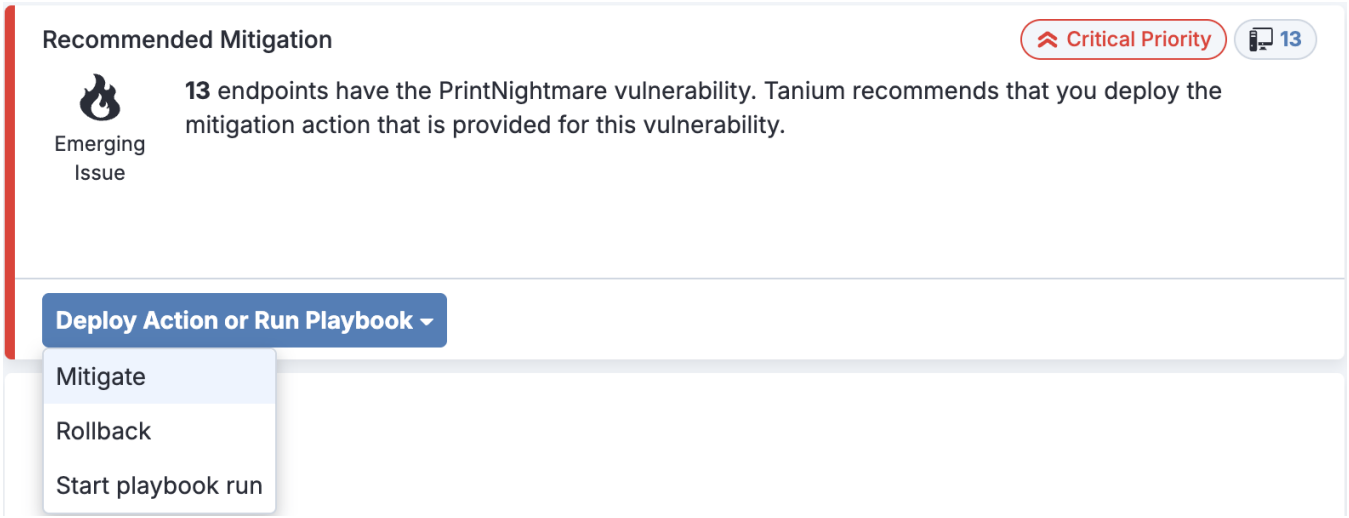
   The report data view in the **Preview** pane provides many of the same filtering options (such as **Filter Group**) as those in an actual report (see Filter data on page 50). However, your filtering selections affect only the data in the **Preview** pane and are not saved to the report or panel when you save the panel.
3. Click **Done** to save the panel.
4. (Optional) Change the panel size and location as described in Move panels on page 105 and Resize panels on page 105.
5. Click **Save** to save the dashboard.

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Add action panels

An action panel contains a message that alerts users to issues that require attention. You can configure the panel to identify the number of affected endpoints and to provide corrective actions that users can deploy to those endpoints. The action panel in Example of an action panel on page 118 indicates how many endpoints have the PrintNightmare vulnerability and provides options for mitigating the vulnerability and for rolling back the mitigation action.

Example of an action panel



Before you add action options to a panel, the packages and playbooks that the actions deploy must exist. If no Tanium-defined packages exist for the issues that the panel addresses, see Tanium Console User Guide: Create a package. If no playbooks exist, see Tanium Automate User Guide: Building playbooks.

NOTE

You can see examples of action panels in Tanium-managed emerging issue dashboards. For more information, see Emerging issue dashboards on page 25.

An action panel is similar to a Tanium Guide notification. For more information, see Tanium Guide User Guide: Notifications.

1. Perform one of the following steps to add a panel to an existing or new dashboard:
   - **Existing dashboard**: From the Main menu, go to **Data > Dashboards**, click the **Dashboard Name**, and click **Edit**.
   - **New dashboard**: Clone an existing dashboard or create one from scratch. The new dashboard automatically opens in edit mode. For more information, see Create dashboards on page 101.
2. Perform one of the following steps depending on the dashboard section where you want to add the panel:
   - **Bottom section**: At the top of the dashboard, select **Add > Add Action Panel**.
   - **Any other section**: In the section where you want the panel, select **Add Panel > Add Action Panel**.

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3. Configure the following settings and then click **Done**:

Action panel settings

Tab	Settings
Type	• **Category**: Select the type of action, such as **Recommended Remediation** or **Recommended Containment**. • **Topic**: Select a label and associated icon to identify the panel topic, such as **Emerging Issues** or **General**. shows an example of how the panel shows an **Emerging Issues** topic. • **Priority**: Select a priority level to help users understand the importance and urgency of the issue that the panel addresses.
Message	Enter the text for users to read in the panel. For example, if the message concerns a vulnerability, you can enter highlights of the latest industry information and Tanium insights on the vulnerability. You can use the same formatting options as for text panels. For more information, see Text panel settings on page 121. Perform the following steps if you want to add the count of affected endpoints to the message. The message can have multiple instances of a count from the same report but cannot have different counts from multiple reports. a. Move your cursor to the spot in the message where you want the count to appear. b. Select the report that provides the count and click **Add**. IMPORTANT If you do not specify a count, the action deployment defaults to targeting all the endpoints that are members of your assigned computer groups. Before deploying the action, review its **Targeting Criteria** and specify any additional filters (such as action groups) as necessary. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.
Actions	(Optional) You can add one or more actions to deploy packages or playbooks that remediate or mitigate issues on endpoints, or to roll back previous remediations or mitigations. Repeat the following steps for each action: a. Click **Add Action**. b. Select an **Action Type**. • To deploy a package, select **Tanium Action**. • To deploy a playbook, select **Playbook**. c. Enter an **Action Label** for the panel button that users click to deploy the action. If you add multiple actions, the button becomes a **Deploy Action or Run Playbook** dropdown list that lists the label for each action. NOTE If there are no affected endpoints, the action panel button is disabled. If you think there should be affected endpoints, see Dashboard action panels with no affected endpoints on page 177. d. Select a package or playbook.

4. (Optional) Change the panel size and location as described in Move panels on page 105 and Resize panels on page 105.

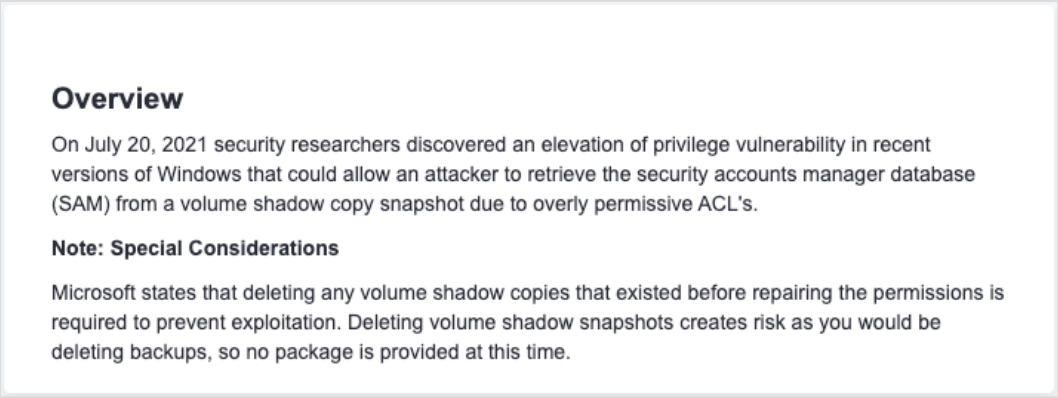
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5. Click **Save** when you finish editing the dashboard.

Add text panels

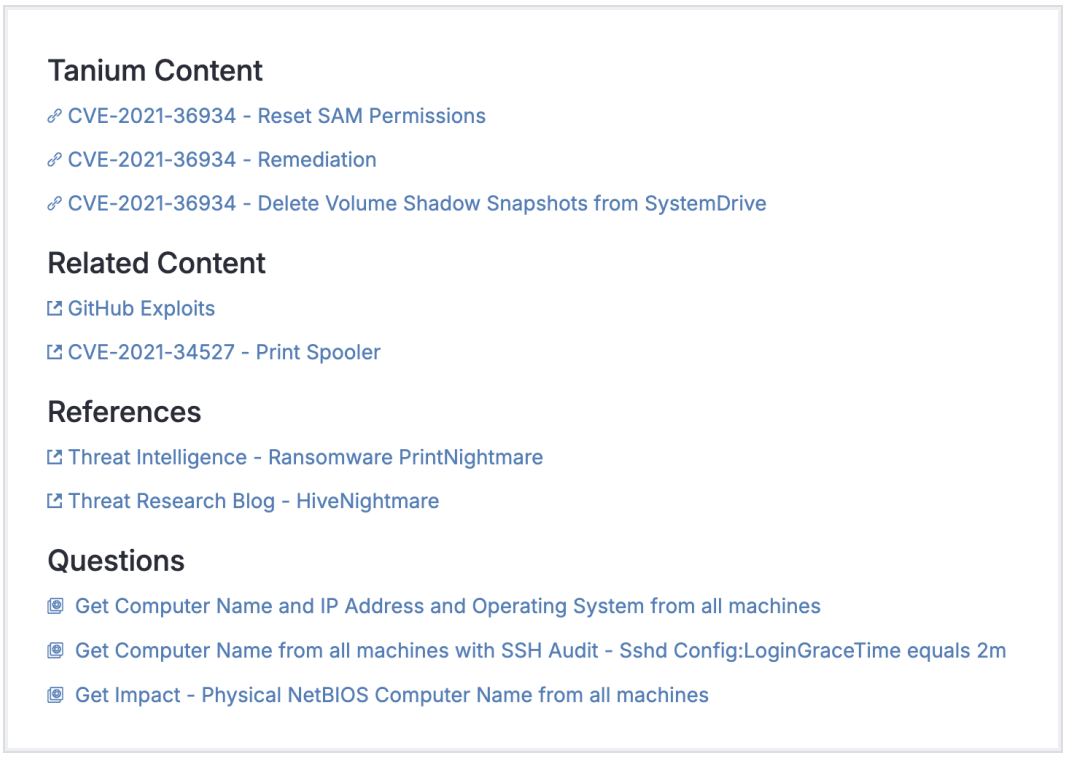
A text panel contains static text that provides context to the report.

Example text panels





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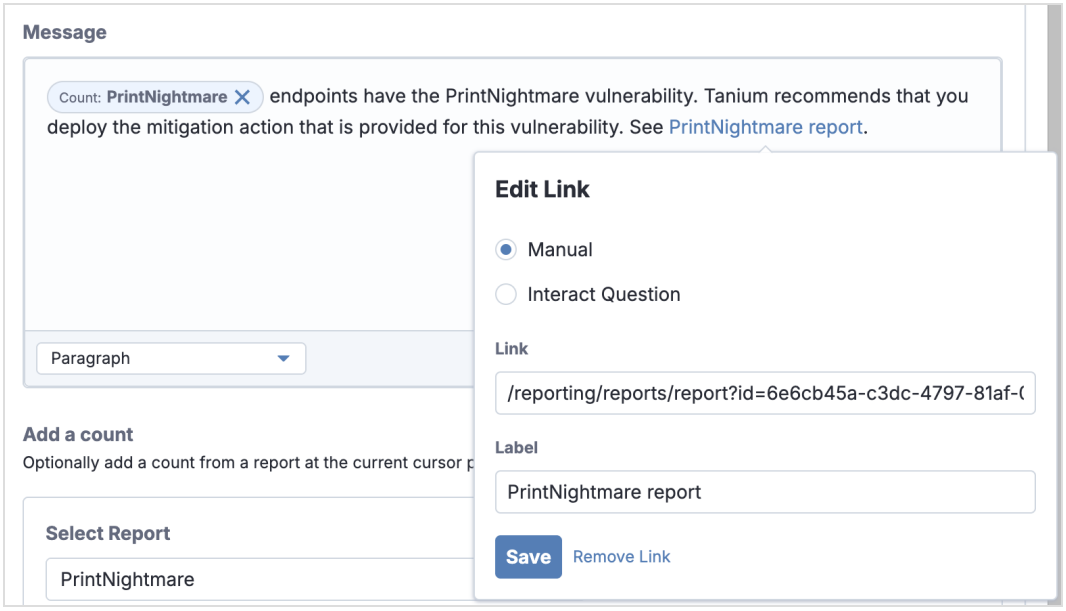
1. Perform one of the following steps to add a panel to an existing or new dashboard:
    - **Existing dashboard**: From the Main menu, go to **Data > Dashboards**, click the **Dashboard Name**, and click **Edit**.
    - **New dashboard**: Clone an existing dashboard or create one from scratch. The new dashboard automatically opens in edit mode. For more information, see Create dashboards on page 101.
2. Perform one of the following steps depending on the dashboard section where you want to add the panel:
    - **Bottom section**: At the top of the dashboard, select **Add > Add Text Panel**.
    - **Any other section**: In the section where you want the panel, select **Add Panel > Add Text Panel**.
3. Configure the following settings to compose the text in the panel, and then click **Done**.

Text panel settings

Setting	Description
Format	Use the dropdown list to select the format of selected text (such as **Heading** or **Paragraph**), or to enter new text in that format. Select **Metric Set** to add a row of metrics. For more information, see Add Metric on page 123.
B	To apply bold formatting to text, select it and click **B**.

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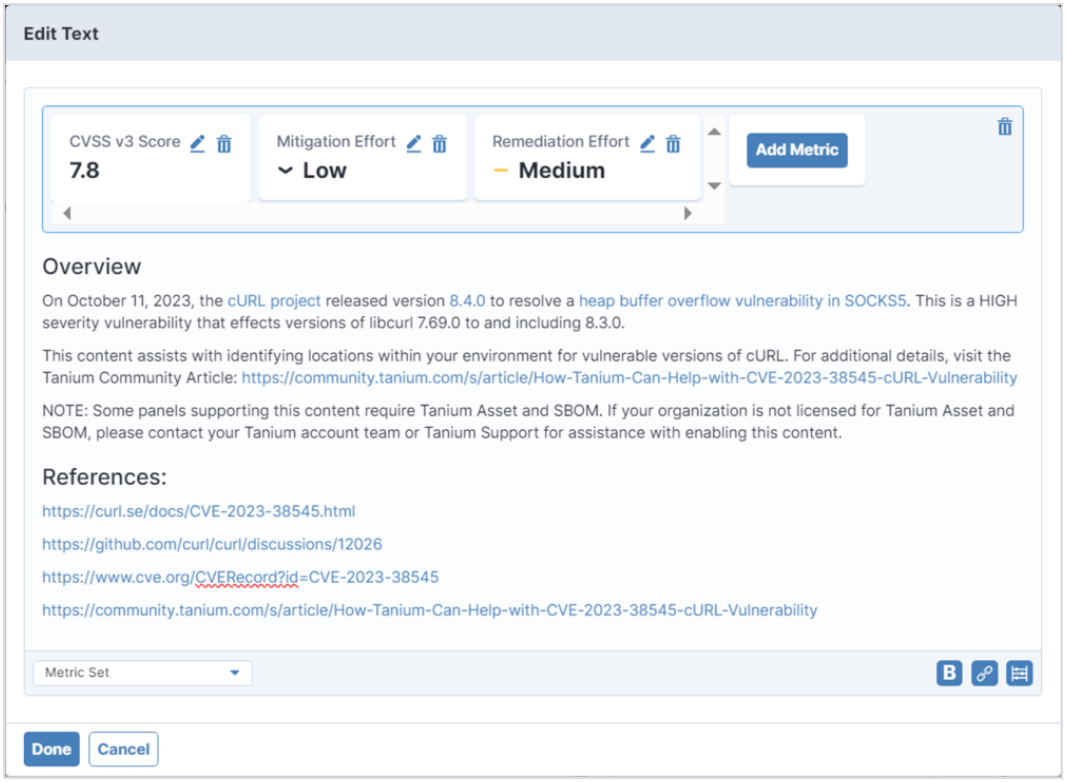
Text panel settings (continued)

Setting	Description
Add Link 	Add links to external sites, Console pages, or Interact question results. To add links to a panel: a. Click Add Link . b. To add a manual link to an external site or Console page, select **Manual**, enter the **Link** URL, and then enter the **Label** to display. The link can be absolute or relative to the Tanium Console root directory (`https://<Tanium FQDN>/ui`). Relative links are useful for accessing pages within Console. The following example shows a relative link to a PrintNightmare report in the Reporting workbench. TIP See the browser URL field for a workbench page to find its path. The corresponding absolute link for the example is: `https://<Tanium FQDN>/ui/reporting/reports/report?id=70ff0350-e787-4420-a8c4-f733b442087f`  NOTE For security, a confirmation prompt appears when a user clicks an external link in Console. If the link targets a Console page for which the user does not have access permissions, the link renders as static text. c. To add a link to Interact question results, select **Interact Question**, select or enter a question, and then enter the **Label** to display. For more information, see Tanium Console User Guide: Querying, searching, and accessing endpoints in Console and Interact and Tanium Console User Guide: Managing question results in Console and Interact. d. Click **Save**.

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Text panel settings (continued)

Setting	Description
Add Metric	Metrics are static text and icons that you can add to a panel to summarize and visualize the main ideas that the panel conveys. In the following figure, the metrics **CVSS Score: 7.8**, **Mitigation Effort:** **Low**, and **Remediation Effort:** **Medium** enable users to understand at a glance how critical the vulnerability is and how much effort is required to resolve it.



To add metrics to a panel:

a. Insert your cursor where you want the metrics to appear and perform one of the following steps:

- **Single metric**: Click Add Metric and Edit .
- **Row of metrics**: Select **Metric Set** in the format dropdown list, click **Add Metric**, and click Edit .

b. Enter a **Name** and **Value** for the metric, specify any of the following options, and click **Save**:

- **Of**: Use this numeric field in conjunction with the **Value**. For example, to show the metric **7 of 10**, set **Value** to `7` and **Of** to `10`.
- **Size**: Set the collective size of the metric (**Name**, **Value**, and **Icon**) to **Large** or **Small**.
- **Icon**: Select an icon that helps users to visualize the state or relevance of the issue that the text panel describes. For example, select **Critical High** to indicate an issue of high importance or Domain Name System (**DNS**) to signify a DNS attack.
- **Icon Color**: Select a color that matches the importance or urgency of the issue. For example, you might select **Negative** (red) to convey an imminent threat to endpoints.

c. (Metric set only) For each additional metric, click **Add Metric**, click Edit , and repeat the previous step.

In edit mode, the text panel contains each metric and metric set in a shaded box. To delete a metric,

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4. (Optional) Change the panel size and location as described in Move panels on page 105 and Resize panels on page 105.
5. Click **Save** when you finish editing the dashboard.

Configure and manage custom alerts

Custom alerts enable users to configure threshold-based notifications directly from chart panels in Reporting dashboards. When thresholds are met, notifications are sent through Guide or email. These alerts help surface critical changes and drive timely action without the need for constant manual monitoring.

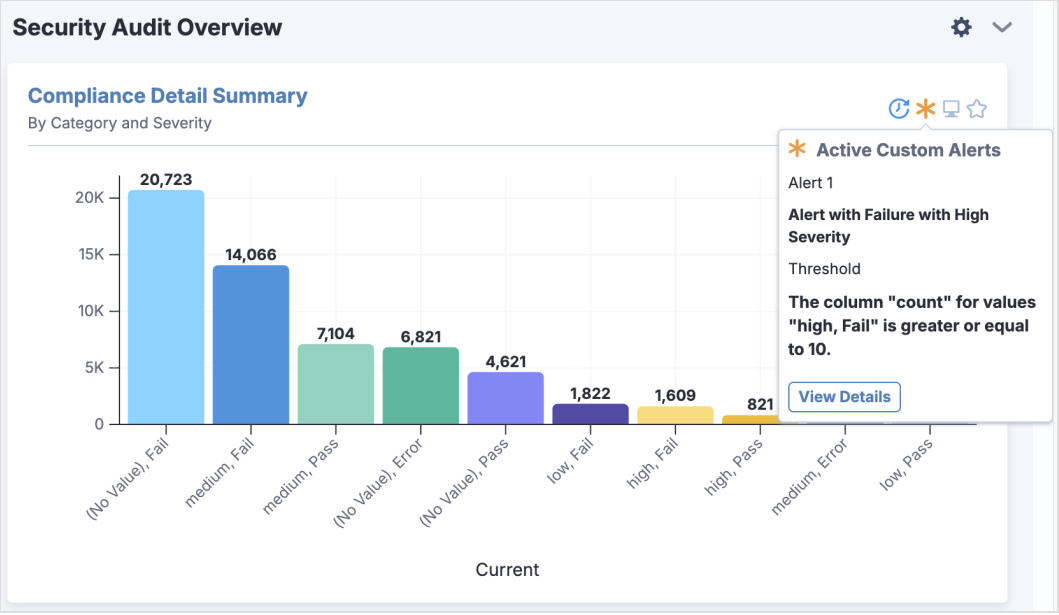
For example, if your chart panel identifies vulnerable versions of cURL in your environment, you can configure a threshold for when one or more endpoints are found with a vulnerable version. Once that threshold condition is met, a Guide notification is generated.

With custom alerts, you can:

- Set thresholds for key metrics like endpoint count, CVE severity, or compliance status.
- Get notified through Guide or email when those thresholds are met.
- View all alerts and their statuses in a centralized view.

After you configure a custom alert, the Custom Alerts icon appears to indicate that an alert is configured but not active. If the threshold condition is met or exceeded, the Active Custom Alerts icon appears instead. You can hover over the icon to view alert details. From the details, you can open the alert configuration to create and manage alerts. You can also open the dashboard in edit mode to create and manage alerts.

The following image shows an example of a chart panel with an active custom alert:



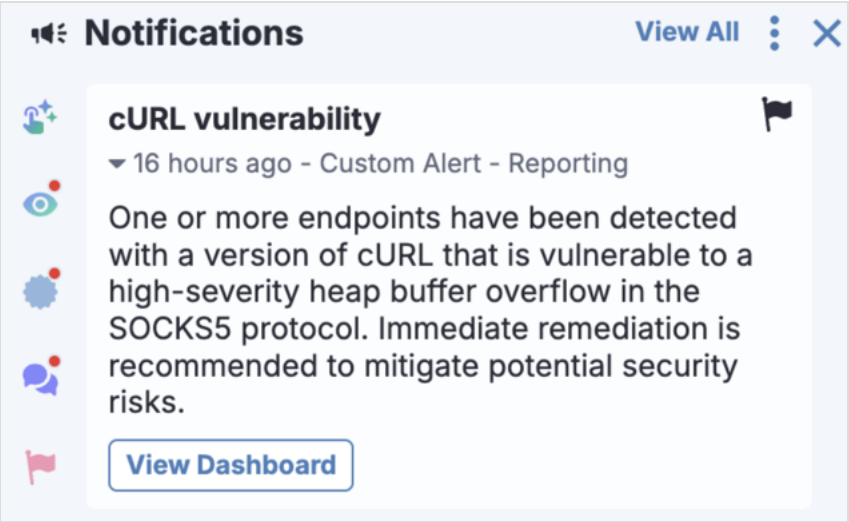
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Guide notifications

> NOTE
>
> To read and acknowledge custom alert notifications in Guide, you require a role with the **Reporting Feed Message Acknowledge** or **Feed Message Acknowledge** permission on the Reporting content set. For more information, see User role requirements on page 33 and Tanium Guide User Guide: User role requirements.

If custom alerts are configured to generate Guide notifications, the notification appears in the Guide slide-out panel and in the Guide page for the configured recipients. For more information about Guide notifications, see Tanium Guide User Guide: Notifications and Tanium Guide User Guide: Viewing and managing notifications.

The following image shows an example of a custom alert notification in the Guide slide-out panel:

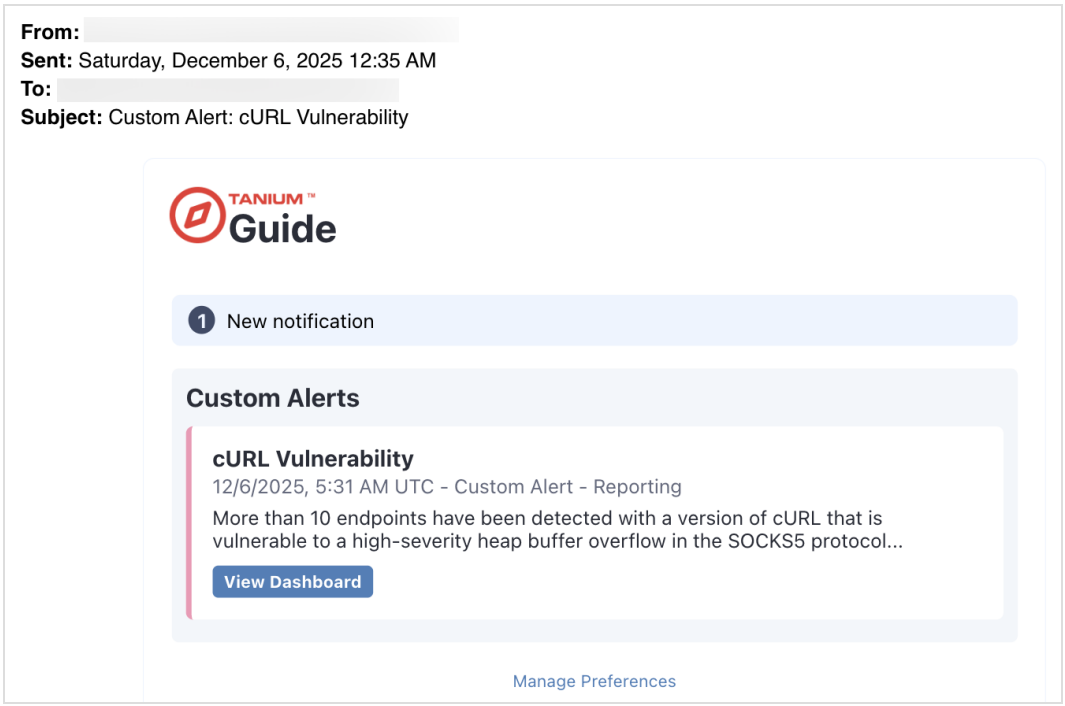


Guide email notifications

If custom alerts are configured to generate emails, the configured recipients receive an email notification. For more information, see Tanium Guide User Guide: View email notifications.

The following image shows an example of an email notification:

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Configure custom alerts

You can configure custom alerts directly from chart panels. A panel can have up to 10 alerts. You can also see a preview of the Guide notification as you configure the alert.

NOTE

Custom alerts require the following roles and permissions:

- To create and manage custom alerts, you require either the **Reporting Operator** or **Reporting User** system roles, as well as the **Guide Custom Alert Author** role. For more information, see User role requirements on page 33 and Tanium Guide User Guide: User role requirements.
- To configure Console user recipients, you require the **User read** permission. For more information, see Tanium Console User Guide: User role requirements.
- To configure email recipients, you require the **Email Config read** permission, and to send email notifications, you require the **Email send** permission. For more information, see Tanium Connect User Guide: User role requirements and Tanium Guide User Guide: User role requirements.

BEFORE YOU BEGIN

- Configure a chart panel. For more information, see Add chart panels on page 106.
- Configure an email server profile in Tanium Connect to send email notifications. For more information, see Tanium Connect User Guide: Configure email server profile settings for Microsoft 365.

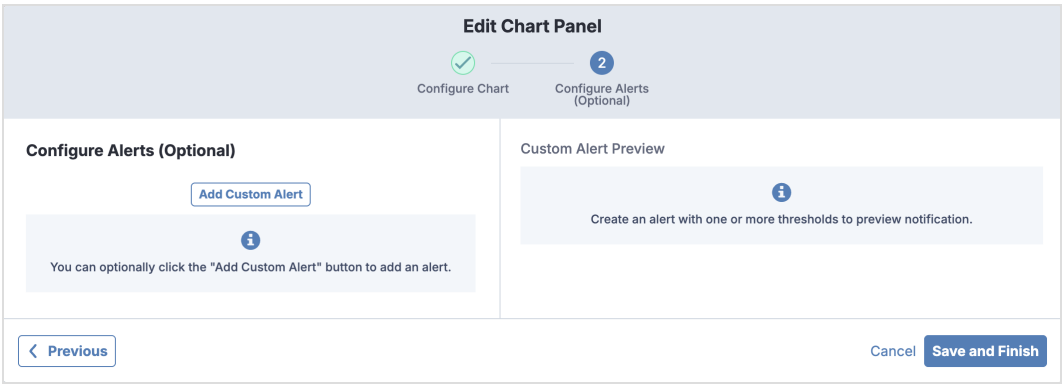
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CONFIGURE CUSTOM ALERTS

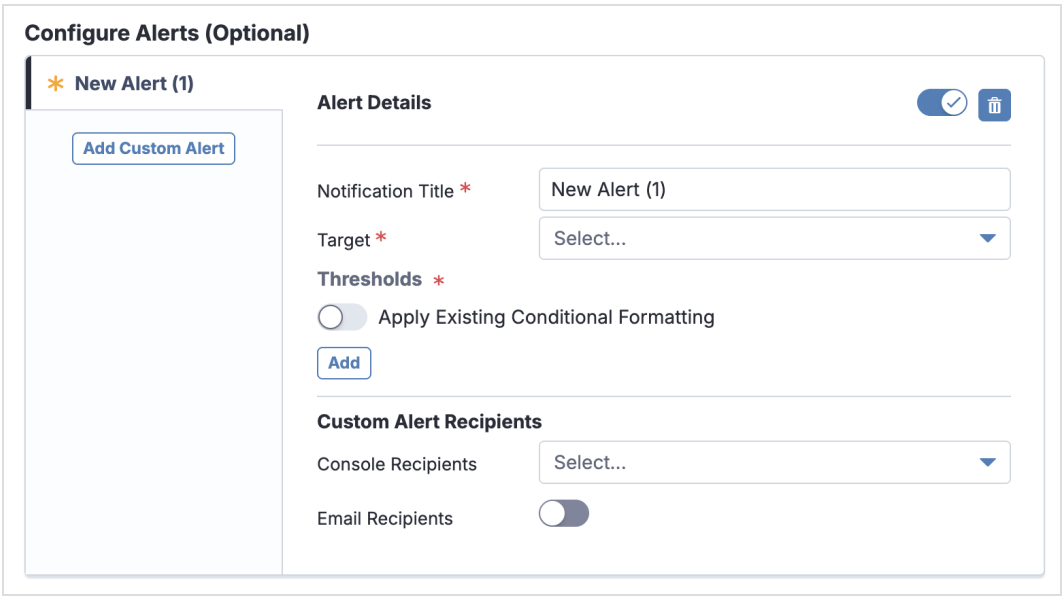
1. Open the alert configuration for a chart panel. You have the following options:

   - In the edit mode of a dashboard, click Configure Alerts for a chart panel.
   - After configuring a chart panel in the **Edit Chart Panel** dialog, click **Next**.

   The **Configure Alerts (optional)** tab appears.



2. Click **Add Custom Alert**.
   The **New Alert** tab appears.



3. Enter a title for the notification.
4. Select the target computer group.

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5. To use the threshold conditions from the charts conditional formatting for Count values, select **Apply Existing Conditional Formatting**. For more information, see Conditional Formatting on page 116.

6. To manually configure a threshold condition:

   a. Click **Add**.

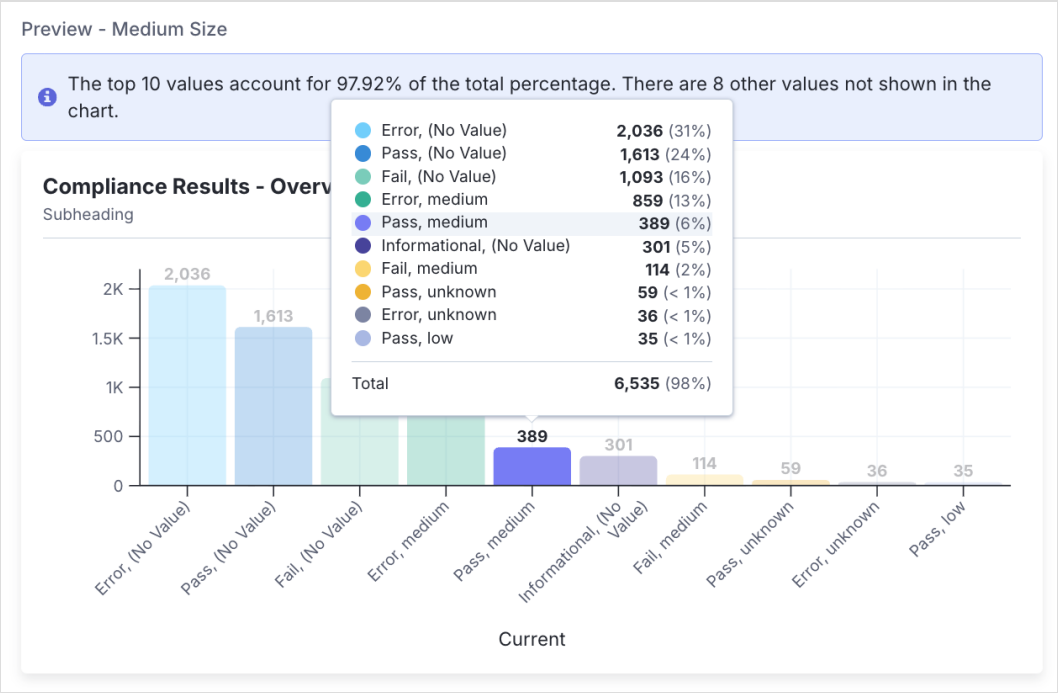
   b. Select an operator (such as **> Greater than**) for the condition.

   c. Enter a value for the condition.

   d. Select whether to use **Count** or **Percentage** as the threshold unit. For example, choose the **Count** unit if you want to be alerted when one or more endpoints are detected using a vulnerable version of cURL. By default, the **Count** unit is selected.

   NOTE

   Percentage-based thresholds are only available for vertical bar charts and donut charts. When you configure percentage-based thresholds, use the percentages in the alert chart preview because the alert evaluates those values to determine when to generate notifications.



   e. Enter a description for the threshold.

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7. In the **Custom Alert Recipient** section, configure the recipients:
    - To send Guide notifications, select the Console users who you want to receive the notifications.

      NOTE

      Guide notifications in Tanium Console are sent only to users with permissions to access the associated data.

    - To send email notifications, select **Email Recipients**. Select the email server profile to use for sending emails and enter the email addresses of recipients, separated by commas.
8. (Optional) To configure additional alerts, click **Add Custom Alert** and define the alert details and recipients. A panel can have up to 10 alerts.
9. Click **Save and Finish**.

Manage custom alerts

You can delete or disable alerts directly from chart panels to manage alerts with full context.

NOTE

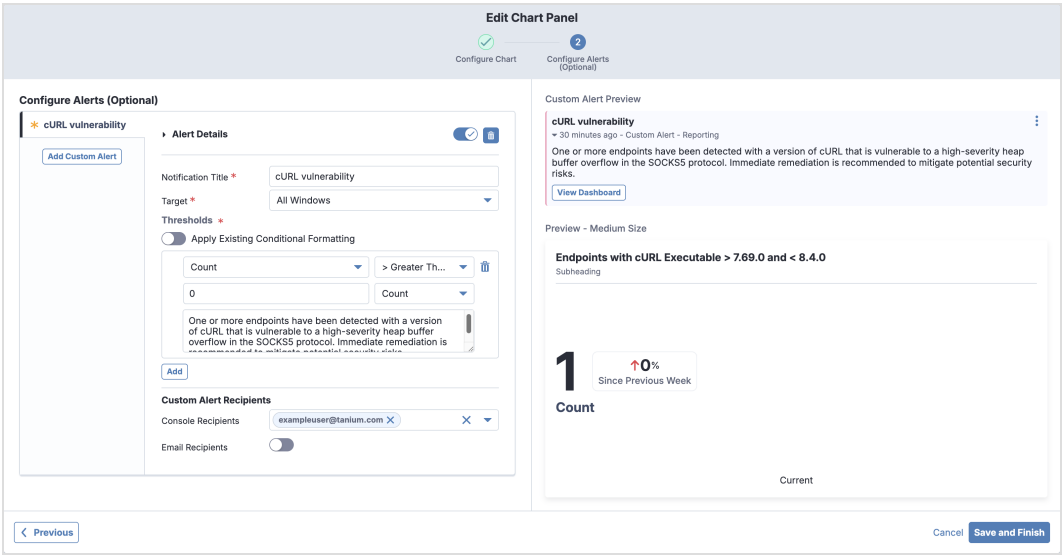
Custom alerts require the following roles and permissions:

- To create and manage custom alerts, you require either the **Reporting Operator** or **Reporting User** system roles, as well as the **Guide Custom Alert Author** role. For more information, see User role requirements on page 33 and Tanium Guide User Guide: User role requirements.
- To configure Console user recipients, you require the **User read** permission. For more information, see Tanium Console User Guide: User role requirements.
- To configure email recipients, you require the **Email Config read** permission, and to send email notifications, you require the **Email send** permission. For more information, see Tanium Connect User Guide: User role requirements and Tanium Guide User Guide: User role requirements.

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1. In the edit mode of a dashboard, click Configure Alerts for a chart panel.

   The **Configure Alerts (Optional)** tab appears.



2. To view auditing information for the alert, click Expand beside **Alert Details**. Auditing information includes who created the alert (Author), when it was created, who last modified the alert, and when.
3. To remove the alert and dismiss all existing notifications, click Delete, and then **Delete** to confirm your action.
4. To disable monitoring and notification, select the alert toggle.
5. Click **Save and Finish**.

Export dashboards

You can export dashboards in the following file formats to the downloads folder of your local browser:

- **JSON**: Export dashboard configurations as a JSON file to import into another Tanium Server. For more information about the import procedure, see Import dashboards on page 132.
- **HTML**: Export the dashboard as a standalone HTML file that you can distribute to stakeholders or post to an internal web server.

TIP

To export reports in HTML format to a destination other than the downloads folder of your local browser, see Export dashboards through Tanium Connect on page 131.

NOTE

Exported dashboards include data for the currently selected **Computer Group** and **Timeframe** filters.

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NOTE

If the export fails, see Dashboards do not load charts or exports fail on page 174.

Dashboard read permission is required to export dashboards. To export dashboards that are associated with reports (through chart panels), **Report read** permission is also required. The predefined roles that have these permissions are Aministrator, Reporting Operator, Reporting User, and Reporting Viewer.

1. From the Main menu, go to **Data > Dashboards**.
2. Perform one of the following steps based on the preferred export format:
   - **JSON**: Select the dashboards and select **Export > Dashboard Definition as JSON** (single dashboard) or click **Export Dashboard Definitions** (multiple dashboards). To review a dashboard before exporting it, click the **Dashboard Name** to open it, review the dashboard, and select **Export > Dashboard Definition as JSON**.
   - **HTML**: Click the **Dashboard Name** to open the dashboard and select **Export > Dashboard as HTML**.

The exported file has the name `dashboard_definition_export_<month_day_year>.json` or `<dashboard-name>_<month_day_year>.html`.

Export dashboards through Tanium Connect

Use Connect to send dashboards to Connect destinations.

Before you begin

You require the following items to export dashboards through Connect:

- Tanium license that includes Connect 5.9.65 or later and Reporting 1.7 or later.
- User account or persona with the following role assignments and permissions:
  - Connect Operator or Connect Administrator role to access Connect.
  - **Dashboard read** and **Report API user** permissions. Predefined roles that have these permissions include Reporting Operator and Reporting User.

Create a connection

The following steps describe the basic settings that you configure for a connection. Additional settings vary by connection destination. For more information, see Tanium Connect User Guide: Managing connections.

1. From the Main menu, go to **Modules > Connect > Connections** and click **Create Connection**.
2. In the **General Information** section, enter a **Name** and optional **Description** for the connection.
3. In the **Configuration** section, select **Tanium Reporting (Reports and Dashboards)** for the **Source**.
4. Select an **Export Format**, and then select **Dashboard** as the **Type**.

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5. Select the **Dashboard** to export and select the **Computer Group** for which to show data. The **Computer Group** selection applies only to dashboard charts that are based on reports, not Module sources on page 14.

   NOTE

   If multiple dashboards have the same name, the list appends `(Author: <user name>, ID:<report identifier>)` to the duplicate names. To match these names with specific dashboards, see Identify dashboards that have duplicate names on page 95.

6. Select the **Destination** where you want Connect to send the dashboard. Provide any additional configuration for the type of destination you select.
7. (Optional) Configure a **Schedule** to send the dashboard.
8. Click **Save**.

When the connection runs, the dashboard is sent to the destination according to the schedule that you set. To manually export the dashboard using the connection settings, select the connection on the Connect **Overview** page and click **Run Now**.

Import dashboards

You can import dashboard configurations that are stored in a JSON file. The following permissions are required for dashboard imports.

Permissions to import dashboards

Permission	Permission Type	Description
Dashboard write	Module (Reporting)	This permission is required to import Reporting dashboards. NOTE The platform content **Dashboard** permission is a different permission that applies to Interact content and is not required to import Reporting dashboards.
Report write	Module (Reporting)	This permission is required if the dashboards that you import are associated with reports through chart or action panels.
Sensor read	Platform content	This permission is required for the content sets that contain the sensors that the imported reports use.
Package read	Platform content	This permission is required for the content sets that contain the packages that the imported reports use. A report uses packages if it includes recommended actions. For more information, see Manage recommended actions on page 87.

The predefined roles **Reporting Operator** and **Reporting User** have **Sensor read** permission for certain content sets, **Dashboard write** permission, and **Report write** permission.

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To export dashboards and any associated reports as a JSON file from another Tanium Server, see Export dashboards on page 130. Then perform the following steps to import the dashboards and reports into the current Tanium Server.

1. Copy the JSON file to a system that is accessible from the computer that you use to sign in to Tanium Console.
2. From the Main menu, go to **Data > Dashboards** and click **Import**.
3. Perform one of the following steps:
   - Drag and drop the JSON file to the **Import a Dashboard.json File** dialog.
   - Click **Browse for File**, select the JSON file, and click **Open**.
4. Review the list of dashboards in the **File Contents**, optionally clear any dashboards that you do not want to import, and click **Import**.
   If the file has no issues to resolve, the import proceeds. If the **Review Import Warnings** page appears, resolve the listed issues as described in the following sections and then click **Import** again.
   - Resolve sensor issues for imports on page 134
   - Resolve package issues for imports on page 135
   - Resolve name conflicts for imports on page 133
   - Resolve invalid content sets for imports on page 135

Resolve name conflicts for imports

If you import a JSON file that contains dashboards or reports with the same names as dashboards or reports that already exist on the Tanium Server, select one of the following options to resolve each name conflict.

Name conflict resolution in dashboard imports

Option	
Skip Import	Omit the dashboard or report from the import process.
Import As New	Import the dashboard or report and retain its current name, notwithstanding that an existing dashboard or report has the same name. NOTE To distinguish among dashboards that have the same name, see Identify dashboards that have duplicate names on page 95. To distinguish among reports that have the same name, see Identify reports that have duplicate names on page 49.
Rename	Rename the dashboard or report that you are importing. When you select this option, a text field appears where you specify the new name.

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Name conflict resolution in dashboard imports (continued)

Option	
Overwrite Existing	Replace the existing dashboard or report with the imported dashboard or report. This option is not available in the following cases: • **Tanium managed**: The existing report or dashboard is Tanium managed. • **Sensors**: The imported report requires sensors that are not registered with TDS, are not present in the environment where you perform the import, or are in a content set for which you do not have **Sensor read** permission. In all these cases, a message indicates the sensors are missing. If you proceed with the import, it omits the affected dashboard panel and associated report. To resolve the issue, see Resolve sensor issues for imports on page 134. • **Packages**: The imported report requires packages that are not present in the environment where you perform the import or are in a content set for which you do not have **Package read** permission. To resolve the issue, see Resolve package issues for imports on page 135. • **Dashboard panel usage**: The imported report has a **Group By Column** selection and either of the following conditions apply: ◦ The imported report does not include the data source that the associated dashboard chart panel uses for the **Group By Column** or **Aggregate** selections. For more information about these settings, see Panel settings: basic on page 107. ◦ The imported report uses a different sensor for flattening data than the existing report. For more information about flattening, see Flattened data on page 17. To use the imported report for the dashboard chart panel, see Resolve dashboard panel issues for imports on page 135.

Resolve sensor issues for imports

If you try to import a dashboard, along with its associated reports, and the **Review Import Warnings** page indicates missing sensors, cancel the import and perform the following steps to resolve the issue.

1. Sign in to Tanium Console as a user who has **Sensor read** permission for all content sets.
2. Go to **Administration > Content > Sensors** and verify the presence and content set assignments of the sensors that the **Review Import Warnings** page listed.
3. Perform one of the following tasks based on the issues that you found in the preceding step.
   - **Missing sensors**: Import the sensors from an environment that has them. **Import Signed Content** permission is required to import sensors. For more information, see Tanium Console User Guide: Import sensors.
   - **Insufficient content set permissions**: Ask an administrator to add the necessary permissions to the user account that you use to perform imports. The account must have **Sensor read** permission on all the content sets of sensors that the imported report uses. For more information, see Tanium Console User Guide: Manage content set permissions for a role.
4. Register the sensors with TDS if they are not already registered. **Data Collection Registration write** permission is required to register sensors. For more information, see Tanium Interact User Guide: Manage sensor registration.
5. Re-import the dashboard that is associated with the report for which you resolved sensor issues.

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Resolve package issues for imports

If you try to import a dashboard, along with its associated reports, and the **Review Import Warnings** page indicates packages are missing or are in content sets that you do not have permission to access, cancel the import and perform the following steps to resolve the issue.

1. Sign in to Tanium Console as a user who has **Package read** permission for all content sets.
2. Go to **Administration > Content > Packages** and verify the presence and content set assignments of the packages that the **Review Import Warnings** page listed.
3. Perform one of the following tasks based on the issues that you found in the preceding step.
    - **Missing packages**: Import the packages from an environment that has them. **Import Signed Content** permission is required to import packages. For more information, see Tanium Console User Guide: Import packages.
    - **Insufficient content set permissions**: Ask an administrator to add the necessary permissions to the user account that you use to perform imports. The account must have **Package read** permission on all the content sets of packages that the imported report uses. For more information, see Tanium Console User Guide: Manage content set permissions for a role.
4. Re-import the dashboard that is associated with the report for which you resolved package issues.

Resolve dashboard panel issues for imports

Perform the following steps if, when importing a dashboard and its associated reports, you cannot overwrite an existing report that has the same name as an imported report due to discrepancies in the settings for an associated dashboard chart panel.

1. In the import workflow (see Import dashboards on page 132), select **Rename** or **Import As New** to resolve the name conflict and proceed with the import.
2. Edit the imported report to match the **Group By Column**, **Aggregate**, or sensor flattening selections of the existing report if those settings are important to preserve for the chart panel in the associated dashboard. For more information, see Edit reports on page 75.
3. Edit the chart panel in the dashboard to use the imported report instead of the existing report. For more information, see Edit dashboards on page 103.
4. (Optional) Delete the existing report if you are sure no other dashboards use it and no other users need it. If you selected the **Import As New** option, deleting the existing report prevents other users from confusing it with the imported report.

Resolve invalid content sets for imports

When you try to import a dashboard, along with its associated reports, the **Review Import Warnings** page might indicate the following issues for the content set that contains the dashboard and reports:

- The content set does not exist in the environment where you perform the import.
- You do not have **Dashboard write** and **Report write** permissions for the content set.

Perform one of the following steps to resolve the issue:

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- On the **Review Import Warnings** page, select **Skip Import** to omit the dashboard or report from the import process.
- On the **Review Import Warnings** page, select **Update Content Set** to assign another content set. When you select this option, a dropdown list appears for you to select a content set. The dropdown list shows only the content sets for which you have **Dashboard write** and **Report write** permissions.
- Cancel the import, create the missing content set, and re-import the dashboard and reports. Only the **Administrator** or **Content Set Administrator** reserved role can create content sets. For more information, see Tanium Console User Guide: Create a content set.
- Cancel the import, ask an administrator to add the necessary content set permissions to the user account that you use to perform imports, and re-import the dashboard and reports. For more information, see Tanium Console User Guide: Manage content set permissions for a role.

Manage dashboards on the Tanium Home page

The Tanium **Home** page includes a **Dashboard** section that shows a dashboard with full-size charts and a **Dashboard List** section that shows small (micro) charts for up to five dashboards. By default, these sections contain Tanium-managed dashboards. Each user can customize which dashboards appear on their Tanium **Home** page. Use the widgets in these sections to filter the dashboard data by computer group, favorites, or alerts. For more information, see Tanium Console User Guide: Work with Reporting dashboards.

NOTE

By default, the **Dashboard** section is hidden. To show the section, click **Customize Page** and select the sections that you want to appear on the Tanium **Home** page. For more information about customizing the **Home** page, see Tanium Console User Guide: Tanium Home page.

The **Dashboard** and **Dashboard List** sections only appear if Reporting 1.8 or later and Interact 2.12 or later are installed in your environment.

Select a dashboard in the Dashboard section

1. From the Main menu, click **Home** and go to the **Dashboard** section.
2. Click Edit and select a dashboard from the dropdown list. To quickly find a dashboard in a long list, enter its name in the **Search** field.

Select dashboards in the Dashboard List section

1. From the Main menu, click **Home** and go to the **Dashboard List** section.
2. Click Edit and select up to five dashboards from the dropdown list. To quickly find a dashboard in a long list, enter the dashboard name in the **Search** field.

Manage historical data for report-based charts

You can perform the following tasks to manage data collection for dashboard charts that are based on report data:

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- View historical data sources on page 138
- Run data collections on page 141
- Disable or enable data collections on page 141

Overview of historical data collection for report-based charts

Reporting collects data every 24 hours for dashboard charts that use reports as the source of data. You can filter the data by a specific date or date range when you configure the chart (see Date/Timeframe on page 114) or when you view the dashboard (see Timeframe on page 99).



For more information about the specific date and date range options for dashboard charts, see Date options on page 187.

The 24-hour collection cycle that Reporting runs for report data does not apply to Module sources on page 14. The intervals at which Tanium solutions push updated module source data to Reporting varies by solution.

HISTORICAL AND CURRENT DATA

When you select a timeframe that includes current data for a dashboard chart that uses a report as the source of data, the chart shows the latest results from TDS for the current data (see Reporting overview on page 13). If you select a timeframe that includes data from a past date, the chart shows the results that Reporting collects at scheduled intervals for that historical data. For example, if you set the timeframe to **Last 7 Days** for a line chart, the chart shows the current data for today and historical data for the previous six days.

CHART DATA SOURCES

For a dashboard chart that is based on a report, the *data source* is the combination of the report that provides the data and the following optional chart settings:

- Group By Column on page 108
- Aggregate on page 108

  If you do not specify the **Aggregate** setting, the chart automatically aggregates the results by **Total Count**.
- Group Tanium Errors on page 109
- Filter Group on page 110
- Source on page 110 condition

If you edit a chart by changing any of the preceding settings or by selecting a different report, and then save the dashboard, Reporting starts a new collection because that new combination of settings comprises a new source. If no other charts use the previous source, Reporting stops collecting data for the previous source after 10 days and removes the collected data.

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Historical data collection does not include data from before you created the chart panel, unless another chart panel with the same source already exists in the environment. Multiple charts can use the same source.

SCHEDULED AND MANUAL DATA COLLECTION

Reporting does not collect chart data when you create the report that provides the data source. Instead, data collection begins when you add a chart to a dashboard, and then save the dashboard. The chart shows a `Collecting initial data` message until the data exists. Reporting collects chart data for each source once every 24 hours. For example, if you save a dashboard with a new chart at 12 PM today, the first collection starts at that moment for the chart source and the next collection starts at 12 PM tomorrow.

You can run the collection process manually at any time for one or more sources, with a minimum of one hour between collections. Manual collections do not change the scheduled collections that Reporting runs. For example, if the next scheduled collection is at 12 PM today and you run a manual collection at 10 AM today, the next scheduled collection remains at 12 PM today instead of resetting to 10 AM tomorrow. For more information about performing a manual collection, see Run data collections on page 141.

COLLECTION FROM COMPUTER GROUPS

Reporting collects historical data from all computer groups that are selected for collection. If you select a new computer group, dashboard charts do not show historical data from that group until the next collections complete for the sources of those charts. For more information, see Select computer groups for data collection on page 46.

View historical data sources

Perform the following steps to view the collection status and other details about the sources that provide data for dashboard charts. All the fields that show date and time values use the time that is local to the system from which you access the Reporting workbench.



You must be assigned a role with **Reporting Historical Sources read** permission to view historical data.

If the source details indicate failed, disabled, or slow collections, see Troubleshooting Reporting on page 170.

1. From the Main menu, go to **Data > Settings > Historical Data Sources**.
   The grid lists sources with the following information.

You can sort the grid by the **Status**, **Average Collection Duration**, or **Last Run** of a collection process.

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Source information

Column	Description
Source	Reporting names each source based on the name of the report that provides the data and on certain chart settings as described under Chart data sources on page 137. TIP To see the error message associated with a failed collection run, expand the source.
Status	The status of the last collection run for the source: **Finished**: The last collection run completed successfully. **Pending**: A collection run is in-progress. **Failed**: The last collection run did not complete successfully.
Last Run	The date and time when the last collection run started. If collection is disabled, hover over the Disabled icon to show a tooltip that describes the reason. For more information, see Data collection failures on page 175.
Next Collection	The date and time of the next collection run.
Average Collection Duration	The average amount of time it takes to run a collection for the source. Consider troubleshooting a source if its collection duration differs greatly from other sources or exceeds one hour. For more information, see Long collection durations on page 176.
Total Data	The amount of data in the last collection run.

2. (Optional) Enter a text string in the **Filter by source** field to show only sources with names that match the string.
3. Click the name of a source to view its details.

   The **Source Details** page contains the following information:

Source Details section

Field	Description
Status	The status of the last collection run for the source: **Finished**: The last collection run completed successfully. **Pending**: A collection run is in-progress. NOTE A source might have multiple runs with the **Pending** state. Runs that time out or are overridden by another run might show the **Pending** state. **Failed**: The last collection run did not complete successfully.
Report	The name of the report that contains the data.

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Source Details section (continued)

Field	Description
Group By Columns	The columns on which the data is grouped. If there are no columns listed, the data is grouped as a single aggregate. For more information about the **Group By Column** or **Aggregate** settings, see Panel settings: basic on page 107.
Filter Group	The chart shows data only from the specified filter group. If the chart has no filter group selection, this field is blank. For more information, see Filter Group on page 110.
Source Filter	The chart shows only the data that matches the source condition that is specified for the chart. If no source condition is specified, this field is blank. For more information, see Source on page 110.
Total Data	The amount of data in the last collection run.

Schedule Details section

Field	Description
Historical Sources	Indicates whether data collection for the source is **Enabled** or **Disabled**. You can click the setting to toggle between these states. If collection is disabled, hover over the Disabled icon in the **Last Run** column to show a tooltip that describes the reason. For more information, see Disable or enable data collections on page 141.
Collection Schedule	How often collection runs are scheduled for the source.
Last Run	The date and time when the last run started. If collection is disabled, hover over the Disabled icon to show a tooltip that describes the reason. For more information, see Data collection failures on page 175.
Last Updated	The data and time when the data for the collection was most recently updated. On successful runs, this field is the same as the **Last Run** field.
Next Collection	The date and time of the next collection run.

The **Collection History** section lists previous and current collection runs.

You can sort the grid by the **Status** or **Last Run** of a collection process.

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Collection History section

Column	Description
Status	The status of the collection run: **Finished**: The collection run completed successfully. **Pending**: A run is in progress. **Failed**: The last collection run did not complete successfully. TIP To see the error message associated with a failed collection, expand the run.
Report Rows	The total number of rows that the source collected.
Grouped Rows	The number of rows collected that match the Group By Column on page 108 value.
Computer Groups	The number of computer groups included in the collection.
Duration	The amount of time it took to collect the data. Consider troubleshooting a source if its collection durations consistently differ a lot from other sources or exceed one hour. For more information, see Long collection durations on page 176.
Last Run	The date and time when the run started.
Total Data	The amount of data that the run collected.

Run data collections

Reporting runs collections automatically ever 24 hours, but you can also run a collection manually at any time for one or more sources. You must wait a minimum of one hour after the last collection for a source before you can run another collection for that source.

NOTE You must be assigned a role with **Reporting Historical Sources write** permission to run the collection process.

1. From the Main menu, go to **Data > Settings > Historical Data Sources**.
2. Select the checkboxes of the desired sources and click **Run Collection**.
   The collection run has **Pending** status until all the data is collected, at which point the status changes to **Finished**.

Disable or enable data collections

Data collection is automatically enabled for a source when you add a dashboard chart that uses the source and then save the dashboard. Disabling collection for certain sources might be useful in environments where a high number of sources make collections slow for all sources. In such cases, you might want to disable collection for certain older sources if users no longer need to see updated historical data in the associated dashboard charts.

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Dashboard charts do not show updates to historical data that occur after collection is disabled for a source. However, a chart with disabled collection still shows current data when you open and view the dashboard.

You can re-enable collection for a source at any time. However, if Reporting disabled collection automatically due to an error condition and you re-enable collection, Reporting disables collection again if the error is unresolved. If collection is disabled for a source, hover over the Disabled icon in the **Last Run** column to show a tooltip that describes the reason. For more information, see Data collection failures on page 175.

1. From the Main menu, go to **Data > Settings > Historical Data Sources**.
2. Select the checkboxes of the sources for which you want to disable or enable collection.
3. Click **Disable Historical Sources** or **Enable Historical Sources**, read the confirmation message to understand the impact, and click **Disable** or **Enable** to proceed.

Delete dashboards

When you delete a dashboard, the operation also deletes all the dashboard panels and sections.



You cannot delete **Tanium Managed** dashboards.

1. From the Main menu, go to **Data > Dashboards**.
2. Perform one of the following steps based on whether you want to review a dashboard before deleting it:
   - **No review**: Select the checkboxes of the dashboards to delete and click **Delete**.
   - **Review**: Click the **Dashboard Name** to open it, review the dashboard, and click **Delete**.

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Working with a single endpoint

Reporting provides an Endpoint Details page where you can view comprehensive information about a single endpoint and perform management tasks on the endpoint, such as deploying actions or stopping processes. The page provides Tanium-managed tabs where you can access the endpoint management features of other Tanium solutions. For example, you can use the **Endpoint Management** tab to deploy patches and software updates as you do in the Tanium Patch and Deploy modules. You can also add custom tabs for workflows that require endpoint information or action options that are not available in Tanium-managed tabs.

NOTE

For the permissions that are required to access the Endpoint Details page and use its features, see Permissions for Endpoint Details page on page 37.

View endpoint details

The Endpoint Details page opens in the Reporting workbench, but you can access it from many Tanium solutions:

- **Reporting**: see Access endpoint details from a report or the Explore Data page on page 143.
- **Tanium Console header**: see Access endpoint details from any Console page on page 145.

  TIP

  Certain features in the Endpoint Details page are available only if the endpoint status is online or connected. When you access the Endpoint Details page through the Console header, you can see the status before opening the Endpoint Details page.

- **Interact question results**: see Access endpoint details from the Question Results page on page 145.
- **Other Tanium solutions**: The workbenches of other Tanium solutions might link to the Endpoint Details page when Reporting is installed.

Regardless of how you access the Endpoint Details page, it provides the same options (see Work with endpoint details on page 147) and Tanium-managed tabs (see Tanium-managed tabs on page 148) based on your user role permissions (see Permissions for Endpoint Details page on page 37).

NOTE

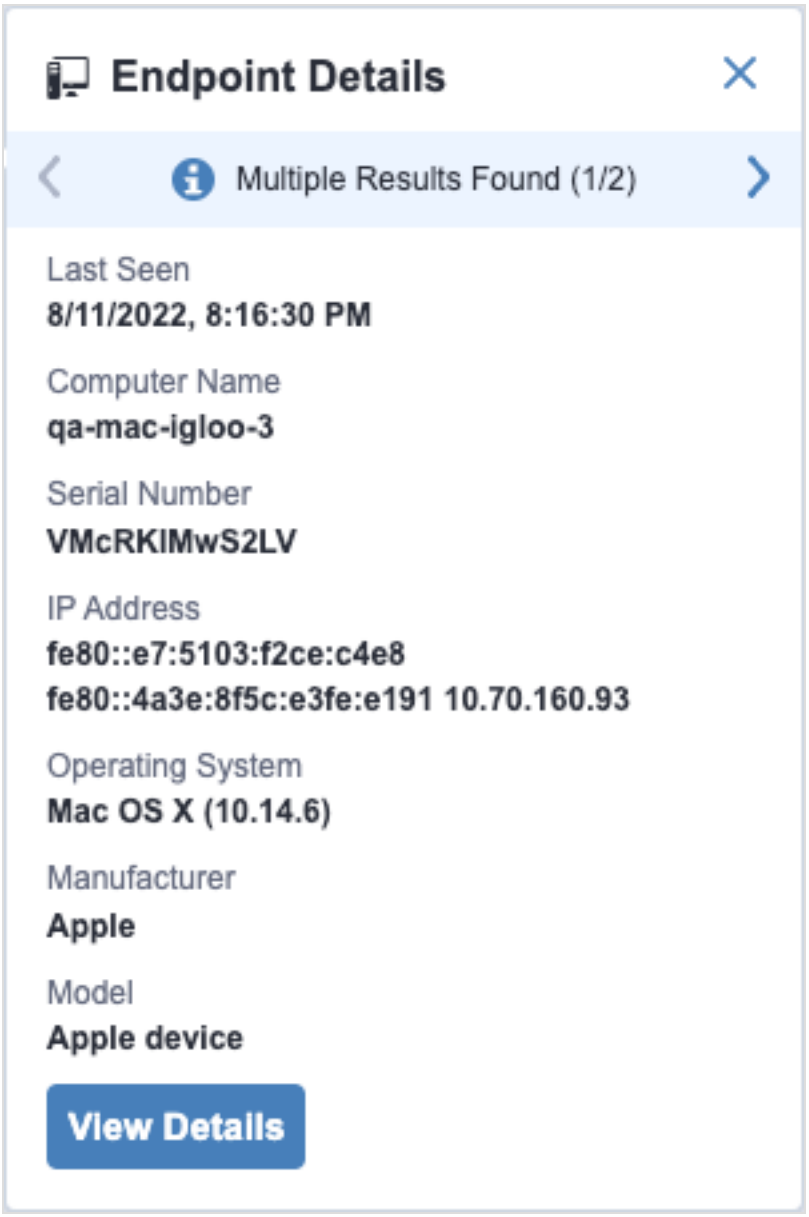
If some details are missing from a tab in the page, see Endpoint Details page shows empty fields on page 177.

Access endpoint details from a report or the Explore Data page

You can access the Endpoint Details page when you view, create, or edit a report that contains the **Computer Name** column (data source):

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1. Perform one of the following steps:
   - Open a report that has the **Computer Name** column with an entry for the endpoint that you want to examine. For more information, see View reports on page 48.
   - Open the **Explore Data** page and add **Computer Name** as a column. For more information, see Explore data and create reports on page 63.
2. Click Endpoint Details beside the name of the endpoint in the **Computer Name** column.
   An **Endpoint Details** dialog opens with basic details for the endpoint. If multiple endpoints have the same **Computer Name**, click Previous or Next in the **Multiple Results Found** banner to find the details for a specific endpoint.



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3. Click **View Details** to open the Endpoint Details page for the endpoint.

Access endpoint details from any Console page

1. In the Console header, click Search Endpoints.

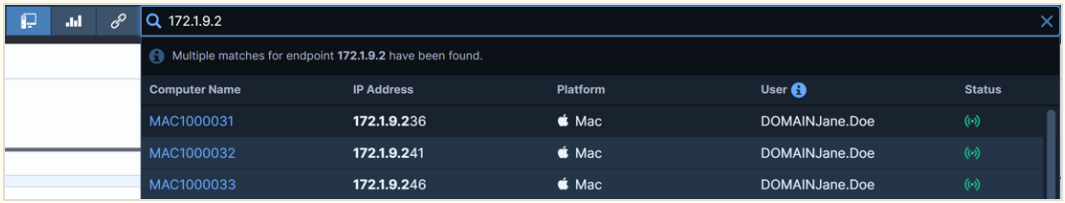
   TIP

   You can also access this field on the Tanium **Home** page, **Search Endpoints** tab.

2. Show basic information about an endpoint by typing its computer name, Tanium Client IP address, or last logged-in user name without pressing **Enter**.

   TIP

   Type a partial string to see basic information about multiple endpoints. For example, if you type `10.20.21`, a dropdown list shows information about all the endpoints with an IP address that contains those digits.

3. Click the **Computer Name** to open the Endpoint Details page for the endpoint.

Access endpoint details from the Question Results page

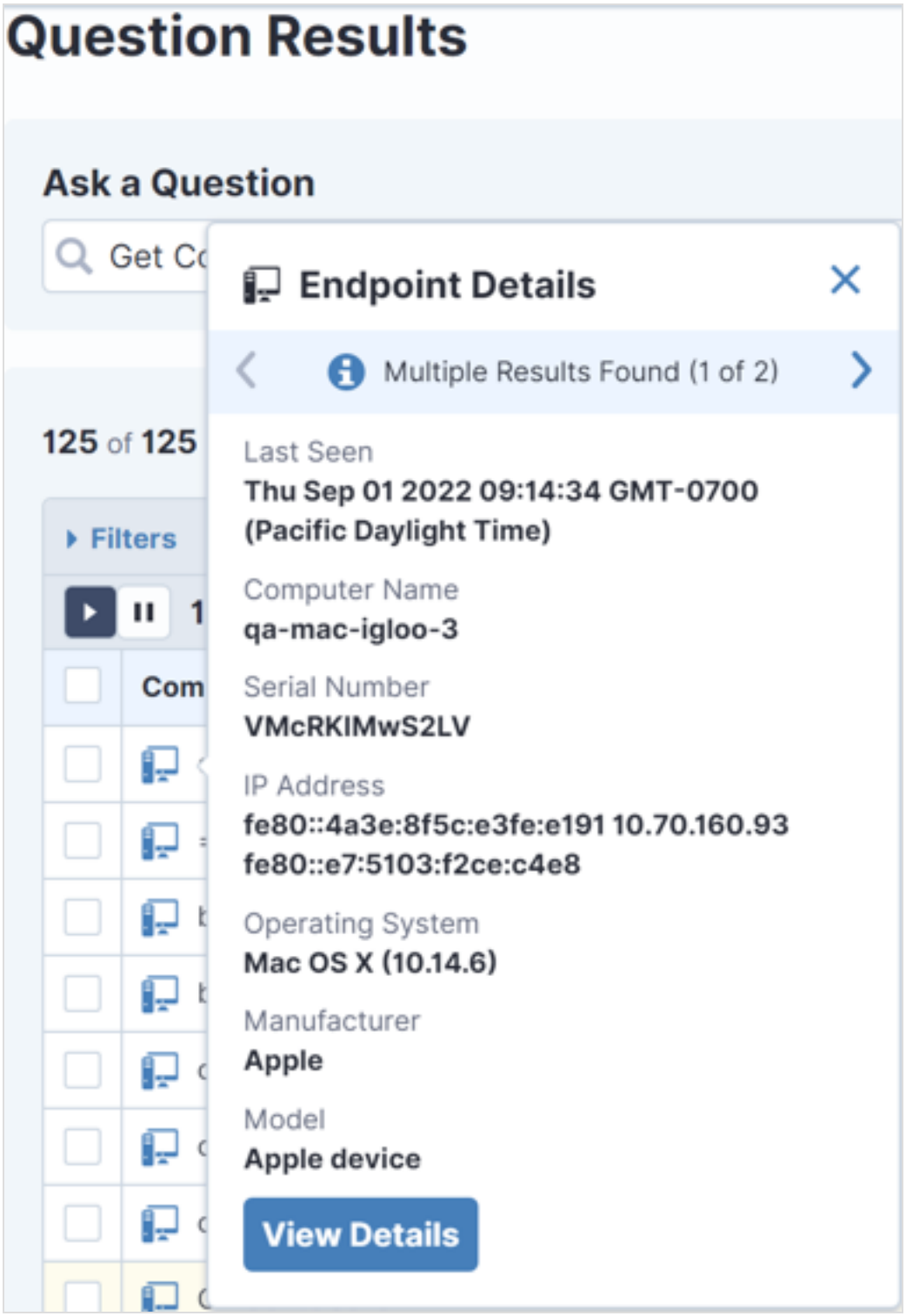
1. Issue a dynamic or saved question that includes the **Computer Name**, **Computer ID**, or **Tanium Client IP Address** sensor. For more information, see Tanium Console User Guide: Asking questions and searching endpoints in Console and Interact.

2. In the **Question Results**, click an endpoint icon to see the details for that endpoint.

   An **Endpoint Details** dialog opens to display the basic information. If multiple endpoints have the same **Computer Name**, **Tanium Client IP Address**, or **Last Logged in User**, click Previous or Next in the **Multiple Results Found** banner to

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find the details for a specific endpoint.



3. Click **View Details** to open the Endpoint Details page for the endpoint.

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Work with endpoint details

The Endpoint Details page provides the following options for viewing information, customizing the page or tabs, and exploring or managing endpoints:

Endpoint Details page options

Option	Description
Show or hide **General Info**	Show general information about the endpoint, such as the IP address and operating system (OS). To see more details in the tabs without having to navigate, you can hide the general information.
View status 	The page indicates the endpoint state: • **Online**: The Endpoint Details page shows current information for the endpoint. The online state is required for action deployment, initiating a direct connection (through Tanium **Direct Connect**), and screen sharing. • **Connected**: The endpoint is online and Reporting has a connection to it through **Direct Connect**. The connected state is required to use the **File Browser** and certain Tanium-managed tabs such as **Investigate**. • **Offline**: The Endpoint Details page shows information that Tanium Data Service (TDS) stored when it last successfully collected data from the endpoint.
File Browser 	If the endpoint is online or connected, click this button to open a **File Browser** for viewing and managing files and directories on the endpoint. For more information about using the **File Browser**, see Browse and manage endpoint file systems on page 161. For the Tanium solutions, roles, and permissions that are required to use the **File Browser**, see File Browser button on page 38.
Open Screen Sharing Session 	If the endpoint is online or connected, click this button to open a Tanium Screen Sharing session for troubleshooting on remote endpoints. For more information about managing sessions, see Open Screen Sharing sessions on page 160. For the Tanium solutions, roles, and permissions that are required to manage sessions, see Open Screen Sharing Session button on page 39.
Direct Connect 	This button appears if one or more installed Tanium solutions require a direct endpoint connection to enable features on the Endpoint Details page. If the endpoint is online, click **Direct Connect** to establish a direct connection through the Direct Connect service. For more information about the features that require a direct connection, see Tanium-managed tabs on page 148. For a list of Tanium solutions, roles, and permissions that are required to establish direct connections, see Direct Connect button on page 39. After you connect to the endpoint, the button label changes to **Disconnect** and the endpoint **Status** changes to connected. Click **Disconnect** to end the connection.
Deploy Action	If the endpoint is online or connected, select a **Deploy Action** option to deploy an action to the endpoint. For the full procedure, see Deploy actions on page 159. For the Tanium solutions, roles, and permissions that are required to deploy actions, see Deploy Action button on page 39.

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Endpoint Details page options (continued)

Option	Description
Open tabs	Click a tab to open it. If your screen is not wide enough to show all the tabs, select **More > *<tab name>*** to open additional tabs.
Reorder tabs	Click Edit and drag the listed tabs into the horizontal order that you prefer.
Show or hide tabs	Click Edit and select or clear the checkboxes to control which tabs the page shows.
Show or hide basic tab settings	Show basic tab settings, such as the **Content Set** assignment and creator (**Author**). To see more details about the endpoint without having to navigate, you can hide the basic tab settings.
Edit basic tab settings	You can edit the name, content set assignment, and description for custom tabs. You can edit only the content set assignment for **Tanium Managed** tabs. Click Edit beside the name of the tab that you want to modify, update the settings, and click **Save**. For more information, see Tab settings on page 151.
Edit tab contents	To edit the sections and panels in a tab, click **Edit** and perform the steps under Edit tabs on page 152.
Create a tab	Click Add Tab and perform the steps under Create a new tab on page 151.
Clone a tab	Click **Clone Tab** and perform the steps under Clone a tab on page 152.
Delete a tab	Click **Delete** and perform the steps under Delete tabs on page 164.

Tanium-managed tabs

The Endpoint Details page provides the following Tanium-managed tabs for investigating and managing a single endpoint. You can identify these tabs by the **Tanium Managed** label in their header.

NOTE

The Tanium-managed tabs that are available for your Tanium Console session depend on your permissions and the Tanium solutions that are installed. For more information, see Permissions for Endpoint Details page on page 37.

OS-specific tabs and panels within tabs appear on the Endpoint Details page only for endpoints that run the associated OS. For example, only the **Endpoint Overview** tab and **Endpoint Details** sub-tab appear for endpoints managed using Microsoft Intune.

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Tanium-managed tabs

Tab	Description
Endpoint Overview	View general information about the endpoint platform and primary user. The information is organized under category sub-tabs. TIP To open the **ADI - Basic Inventory** report for all the endpoints that have a particular custom tag assigned: 1. Open the **Endpoint Overview** tab and click the **Endpoint Details** sub-tab. 2. Click the tag name in the **Identification Information** section.
Endpoint Management	Deploy software packages or OS patches to the endpoint. For more information, see: • Tanium Deploy User Guide: Deploy a software package to a single endpoint. • Tanium Patch User Guide: Create a deployment to install patches on a single endpoint.
Investigate	• Investigate and remediate issues on the endpoint, such as degraded performance, IT outages, and security incidents. • View the history of activities on an endpoint, such as patch installations and logon events. For more information, see Tanium Investigate User Guide: Creating investigations and Tanium Investigate User Guide: Investigating performance and activity history on an endpoint. This tab is enabled only if the endpoint is online and connected. For more information, see Direct Connect on page 147.
Remote Management	• View a summary of resource usage. • View information about processes and services. • View and manage Windows Registry values. • Terminate processes. • Start, stop, or restart services. For more information, see Tanium Investigate User Guide: Managing a single endpoint remotely. This tab is enabled only if the endpoint is online and connected. For more information, see Direct Connect on page 147.

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Tanium-managed tabs (continued)

Tab	Description
Windows Events	• View details (such as severity levels) about events that are recorded in Windows event logs. • Subscribe to events, unsubscribe from events, and add events to investigations. For more information, see Tanium Investigate User Guide: Viewing Windows events. This tab is available only for Windows endpoints and is enabled only if the endpoint is online and connected . For more information, see Direct Connect on page 147.
Engage	View, copy, and export the results of a Tanium Engage Survey on the endpoint. For more information, see Tanium Engage User Guide: View survey results for a single endpoint.
Risk & Compliance	View and export compliance findings, vulnerability findings, and assessments. For more information, see: • Tanium Comply User Guide: Investigate compliance findings • Tanium Comply User Guide: Investigate vulnerability findings • Tanium Comply User Guide: Creating compliance assessments • Tanium Comply User Guide: Creating vulnerability assessments
Client Health	Diagnose and troubleshoot issues on an endpoint. For more information, see: • View and download Tanium Client logs on page 162 • Collect troubleshooting information on page 163 This tab is enabled only if the endpoint is online and connected . For more information, see Direct Connect on page 147.
Action history	View the action history for Microsoft Intune remote actions sent to that endpoint, and view the live action status for the most recent remote action of that action type. This tab is enabled only if Tanium Connector for Microsoft Intune is configured. This tab is displayed.only for endpoints managed using Tanium Connector for Microsoft Intune. For more information, see Tanium Integrations Gallery User Guide: Managing the Tanium Connector for Microsoft Intune.
Installed Applications	View the applications that are installed or pending installation on an endpoint. This tab is enabled only if Tanium Connector for Microsoft Intune is configured. This tab is displayed only for endpoints managed using Tanium Connector for Microsoft Intune. For more information, see Tanium Integrations Gallery User Guide: Managing the Tanium Connector for Microsoft Intune.
Policies	View all Microsoft Intune configuration policies that apply to an endpoint. This tab is enabled only if Tanium Connector for Microsoft Intune is configured. This tab is displayed only for endpoints managed using Tanium Connector for Microsoft Intune. For more information, see Tanium Integrations Gallery User Guide: Managing the Tanium Connector for Microsoft Intune.

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Tanium-managed tabs (continued)

Tab	Description
Managed Applications	View the applications that are installed on an endpoint. This tab is enabled only if Tanium Device Management is configured. For more information, see Tanium Endpoint Management for Mobile User Guide: View the details for a device.

Create custom tabs

Users in your organization might perform routine workflows that require endpoint information that Tanium-managed tabs do not show on the Endpoint Details page. To facilitate such workflows, you can add custom tabs to the page through the following methods:

- Create a new tab on page 151
- Clone a tab on page 152: This is a quicker workflow if an existing tab has settings and content that significantly overlap what you want for the new tab.

> NOTE
>
> You require Reporting **Dashboard write** permission to create custom tabs. For more information, see User role requirements on page 33.

Create a new tab

1. Open the Endpoint Details page for an endpoint. For more information, see View endpoint details.
2. Click Add Tab + besides the tab labels and configure the following settings:

   Tab settings

Setting	Description
Tab Name	Enter a name of up to 255 characters to identify the tab.
Content Set	Assign the tab to a **Content Set**. The dropdown list shows only the content sets for which you have **Dashboard write** permission. Only users who have **Dashboard read** permission for the content set can view the tab.
Description (optional)	Enter a description for other users to understand the purpose and contents of the tab.

3. Click **Save**. Reporting saves the tab and opens it in edit mode.

   > TIP
   >
   > To navigate, reorder, show, or hide tabs, see Work with endpoint details on page 147.

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4. Perform the following tasks to add sections and panels to the tab, and then click **Save**:
    - Add sections on page 154
    - Add text panels on page 154
    - Add preconfigured panels on page 157
    - Add sensor details panels on page 157

Clone a tab

1. Open the Endpoint Details page for an endpoint. For more information, see View endpoint details.
2. Click a tab with settings and contents that are similar to the tab you want to create.
3. Click **Clone Tab**, edit the settings as necessary (see Tab settings on page 151), and click **Save**. Reporting saves the tab and opens it in edit mode.

    TIP To navigate, reorder, show, or hide tabs, see Work with endpoint details on page 147.

4. Edit the sections and panels as necessary (see Edit tabs on page 152), and then click **Save**.

Edit tabs

You can edit an existing tab to change its settings or to add, remove, and reorder sections and panels.

NOTE You require Reporting **Dashboard write** permission to edit tabs. For more information, see User role requirements on page 33.

TIP For **Tanium Managed** tabs, you can edit only the content set assignment. However, you can clone a **Tanium Managed** tab and edit all the settings of the clone. For more information, see Clone a tab on page 152.

1. Open the Endpoint Details page for an endpoint. For more information, see View endpoint details.
2. Click the tab that you want to edit.
3. To edit the tab name, content set assignment, or description, click Edit beside the name, update the settings, and click **Save**. For more information about these settings, see Tab settings on page 151.

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4. To reconfigure the tab sections and panels, click **Edit** and perform whichever of the following tasks are necessary.

> **TIP** If adding a panel to a section is the only change that you want, you can bypass the **Edit** button and instead click ⚙ in the section and select **Add *<panel type>***.

> **NOTE** The tab editor contains a grid layout to assist when you resize and move panels within the grid.
> If you resize or move panels in a section, the section might automatically resize vertically to match the largest height of panels.

Tab editing tasks

Task	Description
Add sections	For more information, see Add sections on page 154.
Edit section names	Type over the existing name for a section to rename it. The name can have up to 255 characters.
Add panels	Add one or more panels to each section: • Add preconfigured panels on page 157. • Add sensor details panels on page 157. • Add text panels on page 154.
Edit panels	Click Edit ✎ at the top of a sensor details panel or text panel and then configure the settings as you do when adding those panel types. You cannot edit a preconfigured panel.
Move sections	Select **Reorder Sections**, and then click and drag sections into the desired order.
Move panels	Click the white space in a panel, and then drag the panel to the desired location. When you release the mouse button, the panel snaps to the nearest coordinates on the design grid.
Resize panels	Click and drag any panel corner or panel edge midpoint. When you release the mouse button, the panel snaps to the nearest coordinates on the design grid. The size of the panel determines how much data it shows. To show more data, enlarge the panel.
Delete sections	Click **Delete** beside the section name to delete the section and any panels in it.
Delete panels	Click Delete 🗑 at the top of the panel.

5. Click **Save** when you finish editing the tab.

> **IMPORTANT** Any changes that you make to the tab are not saved until you click **Save**.

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Add sections

Within a tab, a section is a collapsible division by which to group panels. A tab can contain multiple sections, and each section can contain multiple panels. A tab requires at least one section. If you add a panel to a tab without a section, Reporting automatically creates a section for the panel.

You cannot add sections or panels to **Tanium Managed** tabs. However, you can clone a **Tanium Managed** tab and add sections and panels to the clone. For more information, see Clone a tab on page 152.

1. Open the Endpoint Details page for an endpoint. For more information, see View endpoint details.
2. Open the tab where you want to add sections, and then click **Edit**.
3. At the top of the tab, select **Add > Add Section**.
4. Go to the bottom of the tab to find the new section.
5. Enter a section name of up to 255 characters.
6. Add one or more panels to the section:
   - Add text panels on page 154
   - Add preconfigured panels on page 157
   - Add sensor details panels on page 157
7. Click **Save** when you finish editing the tab.

Add text panels

A text panel contains static text that provides context to a tab or a section within a tab. For example, you can add a text panel to explain the purpose and contents of a tab to other users.

1. Open the Endpoint Details page for an endpoint. For more information, see View endpoint details.
2. Open the tab where you want to add panels, and then click **Edit**.
3. Perform one of the following steps based on where you want to add the panel:
   - **Bottom section**: At the top of the tab, select **Add > Add Text Panel**.
   - **Any other section**: In the section where you want the panel, select **Add > Add Text Panel**.
4. Configure the following settings in the **Edit Text** dialog to compose the panel text, and then click **Done**.

Text panel settings

Setting	Description
Syntax	Use the dropdown list to select the syntax of selected text, or to enter new text with that syntax.

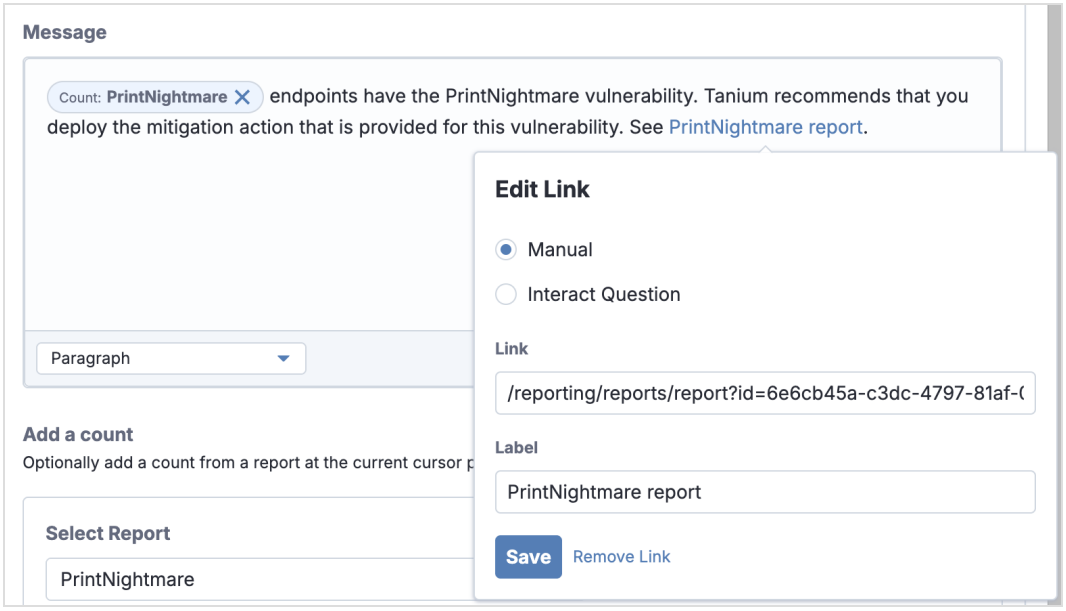
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Text panel settings (continued)

Setting	Description
B	To apply bold formatting to text, select it and click **B**.

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Text panel settings (continued)

Setting	Description
Add Link 	Add links to external sites, Console pages, or Interact question results. To add links to a panel: a. Click Add Link . b. To add a manual link to an external site or Console page, select **Manual**, enter the **Link** URL, and then enter the **Label** to display. The link can be absolute or relative to the Tanium Console root directory (`https://<Tanium FQDN>/ui`). Relative links are useful for accessing pages within Console. The following example shows a relative link to a PrintNightmare report in the Reporting workbench. TIP See the browser URL field for a workbench page to find its path. The corresponding absolute link for the example is: `https://<Tanium FQDN>/ui/reporting/reports/report?id=70ff0350-e787-4420-a8c4-f733b442087f`  NOTE For security, a confirmation prompt appears when a user clicks an external link in Console. If the link targets a Console page for which the user does not have access permissions, the link renders as static text. c. To add a link to Interact question results, select **Interact Question**, select or enter a question, and then enter the **Label** to display. For more information, see Tanium Console User Guide: Querying, searching, and accessing endpoints in Console and Interact and Tanium Console User Guide: Managing question results in Console and Interact. d. Click **Save**.

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Text panel settings (continued)

Setting	Description
Add Metric 	To add metrics to the panel: a. Click Add Metric , enter a name and value for the metric, and specify any optional fields. b. If you are finished adding metrics, click **Apply** to add the metric to the text panel and to close the **Edit Metric** dialog. If you want to add another metric, click **Add** to add the metric to the text panel but keep the **Edit Metric** dialog open. To include multiple metrics in a horizontal row, select the **Metric Set** option from the dropdown list menu on the **Edit Text** dialog. A shaded row appears in the dialog. Click the row, and then click Add Metric . When you add metrics, click **Add** to add another metric to the row.

5. Click **Save** when you finish editing the tab.

Add preconfigured panels

Tanium supplies a gallery of preconfigured panels with information that might be useful to repeat across many custom tabs. For example, you can add the **Maintenance Windows** panel to multiple tabs where it is useful for users to know the schedules for software deployment.

1. Open the Endpoint Details page for an endpoint. For more information, see View endpoint details.
2. Open the tab where you want to add panels, and then click **Edit**.
3. Perform one of the following steps based on where you want to add the panel:
   - **Bottom section**: At the top of the tab, select **Add > Add Preconfigured Panel**.
   - **Any other section**: In the section where you want the panel, select **Add > Add Preconfigured Panel**.
4. Select panels to add and then click **Add Panels**.

   Filter the list of panels by entering a text string containing all or part of a panel name in the **Filter items** field at the top of the **Add Preconfigured Panels** dialog.
5. Click **Save** when you finish editing the tab.

Add sensor details panels

When you create a custom tab, add a sensor details panel to include endpoint information that preconfigured panels do not provide. You select which data sources provide the information in a sensor details panel.

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NOTE

For more information about data sources, see Registered sensors on page 14. You can select only the sources that meet the requirements described in Data sources on page 171.

1. Open the Endpoint Details page for an endpoint. For more information, see View endpoint details.
2. Open the tab where you want to add panels, and then click **Edit**.
3. Perform one of the following steps based on where you want to add the panel:
   - **Bottom section**: At the top of the tab, select **Add > Add Sensor Details Panel**.
   - **Any other section**: In the section where you want the panel, select **Add > Add Sensor Details Panel**.
4. In the **Source Data** panel, add sources to the panel as columns. Perform any of the following tasks to manage source selections and click **Done** when you finish.

Sensor details source data

Task	Description
View source details 	To view the description and details for a source, hover over the source to show the Info icon, then hover over the icon.
Add sources 	In the **Available Columns** list, browse the available sensors and fields that you can add to the report. Expand each category of sources to lists its sensors and fields. To add a source, click Add beside its name. To add a subset of the columns in a multi-column sensor, expand the sensor and Add each column that you want to include. Reporting prompts you to select parameters if a source requires them.
Remove sources 	In the **Selected Columns** list, click Remove beside a source name to remove it from the report, including all the columns in a multi-column sensor. Click Remove beside a particular column name to remove only that column in a multi-column sensor.
Name the panel	Enter a **Panel Name** to appear above the panel in the grid.
Select panel style	Select the **Panel Styling**: • **Vertical Cards**: The panel contains each source in a card, including a card for each column in a multi-column sensor. The panel stacks all the cards vertically. This style is most useful if all the sources are single-column sensors and you want to fit multiple panels in the same row on the tab. • **Horizontal Table**: The panel shows the sources in a grid with a column for each source. If the panel includes multi-column sensors, this style enables you to see the relationships between column values. For example, each grid row shows an application name and its corresponding application version for the **Installed Applications** sensor. If a column is too narrow to show the full sensor name and (if applicable) its parameter value, hover over the ellipsis in the column header to open a tooltip that shows the information.

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Sensor details source data (continued)

Task	Description
Reorder columns  or 	Change the display order of sources based on the **Panel Styling**: • **Vertical Cards**: Drag the  icon for a source to move it. • **Horizontal Table**: Click Custom Columns  and drag the  icon for a column to move it.

5. Click **Save** when you finish editing the tab.

Deploy actions

The Endpoint Details page provides information that can help you determine if an endpoint requires an action. If the endpoint is **Online**  or **Connected** , you can deploy the action directly from the page.



Interact Execute action permission is required to deploy actions.

Quarantine actions are available only if you install the Tanium™ IR Quarantine solution. For more information about the full requirements and OS-specific details, see Tanium Threat Response User Guide: Quarantining endpoints.

1. Open the Endpoint Details page for the endpoint. For more information, see View endpoint details.
2. Deploy an action to the endpoint by selecting a **Deploy Action** option at the top of the page. The available actions vary by endpoint OS.

Available actions by endpoint OS

Action	Operating System	Description
Reboot	All	Reboot the endpoint.
Quarantine	Windows, macOS	• **Windows endpoint**: Quarantine an endpoint on which the Windows IPsec Policy Agent is running. • **macOS endpoint**: Quarantine an endpoint that has Packet Filter (PF) software installed.
Quarantine with IPTables	Linux	Quarantine an endpoint that supports the iptables module.
Quarantine with SELinux Policy	Linux	Enables an endpoint that is enforcing SELinux policies to add a policy for Tanium Quarantine. After enabling the endpoint, you must deploy the **Quarantine with IPTables** action to then quarantine the endpoint.

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Available actions by endpoint OS (continued)

Action	Operating System	Description
User Lockout	Windows	These action types are available only if you configured them in Tanium Provision. For more information about these actions and the configuration steps, see Tanium Provision User Guide: Retiring and locking devices.
Unlock User		
Delete all non-essential files		
BitLocker Freeze		
All Actions	All	Open the **Action Deployment** page, where you can configure a custom action. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Open Screen Sharing sessions

Open a Screen Sharing session to remotely view and control an endpoint for investigating and troubleshooting issues on it. Screen Sharing is particularly useful for IT help desk technicians to determine root causes that the endpoint user cannot determine. The endpoint must be **Online** or **Connected** to establish a Screen Sharing session.

NOTE

You must set up Screen Sharing before you can open a session. For more information, see Tanium Direct Connect User Guide: Opening screen sharing sessions.

1. Open the Endpoint Details page for the endpoint. For more information, see View endpoint details.
2. Click **Open Screen Sharing Session** to connect to the endpoint.
3. (Windows endpoints only) Select **Ask the endpoint user for permission** to start an attended session or clear the checkbox to start an unattended session.
4. (Optional) Select or clear **Record session** if this option was configured during the Screen Sharing setup.
5. Click **Open** to start the session.

   The Tanium Server deploys an action to the endpoint that includes an executable file that connects to ScreenMeet services. Establishing connections can take between one and three minutes. If you initiated an attended session that is on the computer of an end user, the user must accept the session on the computer before you can continue.

   When the connection is established, your screen switches to ScreenMeet in Tanium. You can use Support Tools in ScreenMeet to run Windows commands, tasks, tools, and so on.

   To configure ScreenMeet settings or perform other Screen Sharing tasks, see Tanium Direct Connect User Guide: Opening screen sharing sessions.
6. Click **End Screen Sharing** when you finish the session.

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Browse and manage endpoint file systems

When you investigate activities on an endpoint through the Endpoint Details page, you can use the **File Browser** to download specific files to keep as evidence, view the contents of files and directories that warrant further analysis, or delete files and directories that are involved in suspicious activities. The **File Browser** button is available only if the endpoint is **Online** or **Connected**.

> NOTE
>
> For more information about the Tanium solutions and permissions that are required to use the **File Browser**, see File Browser button on page 38.

1. Open the Endpoint Details page for the endpoint. For more information, see View endpoint details.
2. Click **File Browser** to open the file browser. If the endpoint is not yet **Connected**, a connection is established and the file browser opens.

   > NOTE
   >
   > Once connected, any panels on the Endpoint Details page that use **Direct Connect** to retrieve data from the endpoint begin to populate with data.

3. Use the **File Browser** dialog to view and manage the file system.

File system management tasks

Task	Description
Navigate directories	Use the **Path** section to navigate directories. This section shows the current directory path in the **Path** field, provides a dropdown list for selecting the drive, and shows a button for each directory in the current path. The grid lists the sub-directories and files in the current directory. • Click a directory in the grid to navigate to the directory. • Manually enter a path in the **Path** field. • Click Up to navigate to the parent of the current directory. • Click a directory button to quickly navigate to that directory. • Select a drive from the dropdown list or manually enter the drive letter in the **Path** field and click **Open**.
Filter	Enter a text string in the **Filter items** field to show only files and directories with names that contain the string.

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File system management tasks (continued)

Task	Description
View file 	The **File Browser** grid uses icons to indicate the types of content:  Directory  Directory symbolic link  File  File symbolic link  Other or unknown The grid provides the following viewing options: • **File contents**: Expand  a file to show its contents. • **Continuous fetching**: Toggle on the **Tail** option to continuously fetch the end of the file. This option is useful when you view logs or other files that add new lines to the end of the file. Click **Tail** again to toggle off continuous fetching. • **File search**: Expand  a file, click inside its contents, press **Ctrl+F** on Windows or **Command+F** on macOS, and enter a search string.
Delete file 	To delete a single file, click Delete  in the row for that file. To delete multiple files, select the file checkboxes and click **Delete** in the grid toolbar.
Download file 	To download a single file, click Download  in the row for that file. To download multiple files, select the file check and click **Download** in the grid toolbar.
Export or copy grid contents	Select **Export > Export to CSV** to download the grid contents as a CSV file or select **Export > Copy to clipboard** to copy the contents to your clipboard.

View and download Tanium Client logs

View and download Tanium Clients logs to investigate and troubleshoot issues on an endpoint.



For more information about the Tanium solutions and permissions that are required to use view and download Client logs, see Client Health tab on page 41.

1. Open the Endpoint Details page for the endpoint, which must be **Online**  or **Connected**  to enable viewing Client logs. For more information, see View endpoint details.
2. Select the **Client Health** tab and, if the endpoint is not yet **Connected** , click  **Direct Connect**.

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3. Perform one of the following steps based on the log type to view the contents of a log:

   - **Action log**: Go to the **Actions** section and select the action for which you want to view the log file. The **Actions** dropdown list shows the following information for each action:

     Action options

Actions options	Description
Action description	The dropdown list shows the descriptions for the 20 latest actions, with the actions IDs in parentheses. For the remaining actions, the dropdown list shows only the IDs.
Action ID	To match an action ID to an action, see Tanium Console User Guide: Track action IDs.
Status	Icons indicate the state of each action:  Succeeded or completed  Stopped Failed, expired, or pending verification  Downloading  Unknown state

   - **Other log types**: Go to the **Logs** section and select a file to view its contents. The log file paths have the format `<Client installation directory>/Logs/<log type><#>.txt`.

     The Tanium Client rolls over logs automatically, which means it creates a new file and increments the number `<#>` whenever the current log reaches its maximum size. The oldest log has the highest number and the number is always zero 0 for the current log (such as `log0.txt`).

     For more information about Client log types, see Tanium Client Management User Guide: Troubleshooting Tanium Clients and Client Management.

     For more information about log rollover, see the guide for your deployment infrastructure:

     - Appliance: Tanium Appliance User Guide: Reviewing logs and troubleshooting Tanium Core Platform in an Appliance deployment
     - Windows: Tanium Core Platform User Guide for Windows Deployments: Reviewing logs and troubleshooting Tanium Core Platform in a Windows deployment.

4. (Optional) Click **Download** to export the log file to the local downloads folder of your browser.

Collect troubleshooting information

An Endpoint Must Gather (EMG) is a bundle of logs and other artifacts that you can download from an endpoint to use for troubleshooting issues on that endpoint.

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NOTE

For more information about the Tanium solutions and permissions that are required to use download EMGs, see Client Health tab on page 41.

1. Open the Endpoint Details page for the endpoint, which must be **Online** or **Connected**. For more information, see View endpoint details.
2. Select the **Client Health** tab and, if the endpoint is not yet **Connected**, click **Direct Connect**.
3. Go to the **Available Steps** grid, select the domains (types of logs and artifacts) to include in the EMG and click **Gather from Endpoint**.

   The **Must Gathers** grid shows the progress and status of the collection. Wait for the collection to complete before continuing.

   TIP

   Expand an EMG to see its ID, run time, and contents.
4. Select the EMG and click **Download**.

   The Tanium Server downloads the EMG as a ZIP file to the local downloads folder of your browser.

Delete tabs

When you delete a tab, the operation also deletes any panels and sections in the tab.

NOTE

You cannot delete **Tanium Managed** tabs.

You require Reporting **Dashboard write** permission to delete custom tabs.

1. Open the Endpoint Details page for an endpoint. For more information, see View endpoint details.
2. Open the tab that you want to delete, and then click **Delete**.

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Managing labels

In Reporting, labels enable you to filter the **Reports** page and **Dashboards** page based on qualities that are not captured in other report and dashboard properties. Using labels as filters makes it easier to find reports and dashboards that are relevant to your role or current workflow. For example, you can create and assign a `Vulnerability` label and then filter the **Reports** page to show only reports that present data pertaining to vulnerabilities. Reports and dashboards share the same set of labels.

Tanium assigns predefined labels to Tanium-managed reports and dashboards. You can add custom labels to both Tanium-managed and user-configured reports and dashboards. If you remove a Tanium-assigned label from a Tanium-managed report or dashboard, Reporting might reassign the label after an upgrade or re-import.

Before you begin

You need the following role permissions to work with labels:

- **Reporting Category read** permission is required to:
    - View the **Labels** list and label assignments. The list appears on the **Reports** and **Dashboards** pages. Label assignments are visible in individual reports and dashboards.
    - Apply labels as a filter on the **Reports** and **Dashboards** pages.
    - Filter the **Labels** list by favorites and sort the list.
    - Change the favorite status of labels.
    - Manage label assignments (assign or unassign) for reports and dashboards.
- **Reporting Category write** permission is required to:
    - Create labels.
    - Edit labels.
    - Delete labels.

View labels

To view labels, go to the Main menu and select **Data > Reports** or **Data > Dashboards**.

The **Reports** page and **Dashboards** page show the same labels in the **Labels** section, which is expanded by default. Based on which page you open, the number in each label indicates the number of reports or dashboards to which the label is assigned.

Configure the following options to filter the **Labels** section and change how it lists labels:

Labels presentation options

Option	Description
Filter by name	Enter an alphanumeric string to match all or part of a label name to find a specific label if the list is long.

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Labels presentation options (continued)

Option	Description
Filter by favorites	Click Options ⋮ and select **Show All** labels or **Show Favorites**.
Change favorite status 	Click ☆ to assign favorite status to a label or click ★ to unassign favorite status.
Sort	Click Options ⋮ and select **Sort by Number of Reports/Dashboards** or **Sort Alphabetically**.
Collapse/expand **Labels** section 	Collapse the **Labels** section to expand the **Reports** or **Dashboards** grid horizontally. Expand the **Labels** section to work with the labels.

Filter reports or dashboards by labels

You can filter the **Reports** page or **Dashboards** page to list only the reports or dashboards to which certain labels are assigned:

1. From the Main menu, go to **Data > Reports** or **Data > Dashboards**.
2. In the **Labels** section, select the desired labels. The page refreshes to apply your selections.

Another way to apply a label as a filter to the **Data > Reports** or **Data > Dashboards** page is to open a report or dashboard, click Expand beside the report or dashboard name, and then click one of the **Labels**.

Create labels

Create a label from the **Reports** or **Dashboards** page:

1. From the Main menu, go to **Data > Reports** or **Data > Dashboards**.
2. In the **Labels** section, click Options and select **Add Label**.
3. Enter a label name and click **Add**.

The label appears in the **Labels** section and is available to all reports and dashboards.

You can also create labels when you configure the basic settings of:

- A new report (see Explore data and create reports on page 63) or existing report (see Edit reports on page 75)
- A new dashboard (see Create dashboards on page 101) or existing dashboard (see Edit dashboards on page 103)

Edit labels

You can edit a label name from the **Reports** or **Dashboards** page.

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NOTE

To edit label assignments, see Manage label assignments for reports on page 167 or Manage label assignments for dashboards on page 168.

1. From the Main menu, go to **Data > Reports** or **Data > Dashboards**.
2. In the **Labels** section, hover your cursor over the label that you want to edit and click .
3. Enter a **New Label Name** and click **Save**.

Manage label assignments for reports

You can change which labels are assigned to reports when you:

- Create a report. For more information, see Explore data and create reports on page 63.
- Edit an existing report. For more information, see Edit reports on page 75.
- View existing reports on the **Reports** page, as described in the following steps. This is the only workflow where you can manage label assignments for multiple reports in a single operation.

NOTE

You can assign labels to custom and Tanium-managed reports and you can unassign labels from custom reports. If you unassign Tanium-assigned labels from a Tanium-managed report, those labels are restored the next time you update or re-import Reporting. However, you can unassign labels that another user assigned to a Tanium-managed report.

Perform the following steps to manage label assignments for one or more reports:

1. From the Main menu, go to **Data > Reports**.
2. Verify that the **Labels** section lists any labels that you want to assign.
   To add labels, see Create labels on page 166.
3. In the **Reports** grid, select the reports for which you want to change label assignments.
4. Click **Manage Labels**. In the **Manage Labels** dialog, the checkboxes indicate which labels are currently assigned to the selected reports:
   - **Check mark** : The label is assigned to all the selected reports.
   - **Dash** : The label is assigned to some of the selected reports but not all.
   - **Clear**: The label is not assigned to any of the selected reports.
5. Select (assign) or clear (unassign) checkboxes to change the label assignments, and click **Save**. If the checkbox has a dash , click it once to assign the label to all the selected reports or click it twice to unassign the label from all the selected reports.

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Manage label assignments for dashboards

You can change which labels are assigned to dashboards when you:

- Create a dashboard. For more information, see Create dashboards on page 101.
- Edit an existing dashboard. For more information, see Edit dashboards on page 103.
- View existing dashboards on the **Dashboards** page, as described in the following steps. This is the only workflow where you can manage label assignments for multiple dashboards in a single operation.

> NOTE
>
> You can assign labels to custom and Tanium-managed dashboards and you can unassign labels from custom dashboards. If you unassign Tanium-assigned labels from a Tanium-managed dashboard, those labels are restored the next time you update or re-import Reporting. However, you can unassign labels that another user assigned to a Tanium-managed dashboard.

Manage label assignments for one or more dashboards:

1. From the Main menu, go to **Data > Dashboards**.
2. Verify that the **Labels** section lists any labels that you want to assign.
   To add labels, see Create labels on page 166.
3. In the **Dashboards** grid, select the dashboards for which you want to change label assignments.
4. Click **Manage Labels**. In the **Manage Labels** dialog, the checkboxes indicate which labels are currently assigned to the selected dashboards:
   - **Check mark** ☑: The label is assigned to all the selected dashboards.
   - **Dash** ▬: The label is assigned to some of the selected dashboards but not all.
   - **Clear**: The label is not assigned to any of the selected dashboards.
5. Select (assign) or clear (unassign) checkboxes to change the label assignments, and then click **Save**. If the checkbox has a dash ▬, click it once to assign the label to all the selected dashboards or click it twice to unassign the label from all the selected dashboards.

Delete labels

You can delete a label from the **Reports** or **Dashboards** page. When you delete labels, Reporting unassigns them from reports or dashboards.

> NOTE
>
> To unassign labels without deleting them, see Manage label assignments for reports on page 167 or Manage label assignments for dashboards on page 168.

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NOTE

If you delete a Tanium-defined label, it is restored and reassigned to Tanium-managed reports and dashboards the next time you update or re-import Reporting.

1. From the Main menu, go to **Data > Reports** or **Data > Dashboards**.
2. In the **Labels** section, hover over the label and click Delete .

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Troubleshooting Reporting

Collect logs

To send information to Tanium Support for troubleshooting Reporting, perform the following steps to collect logs and other relevant information. The information is saved as a ZIP file that you can download with your browser. The ZIP file is also known as a support bundle.

1. From the Main menu, go to **Data > Settings > Troubleshooting**.
2. Select the solutions for which to gather troubleshooting packages and click **Create Packages**.
   By default, all solutions are selected. The **Status** changes to `Complete` when the packages are ready to download.
3. Click **Download Packages**.
   ZIP files of all the selected packages download to the local download directory.

   Some browsers might block multiple downloads by default. Configure your browser to permit multiple downloads from Tanium Console.
4. Contact Tanium Support on page 179 to determine the best option to send the ZIP files.

Reporting content is not available

Users cannot access content if they do not have RBAC permissions for the content sets to which the content is assigned. For example, sensors, reports, and dashboards are types of content that require content set permissions. You require read permissions to view content and write permissions to add, edit, or delete content.



Even with **Report write** or **Dashboard write** permission, you cannot delete Tanium-managed reports, dashboards, or tabs (on the Endpoint Details page) and you can edit only their content set assignments.

If you cannot access certain content in Reporting, ensure that your user account has sufficient permissions. User role requirements on page 33 describes the permissions that are assigned to predefined Reporting roles.

In addition to permissions, other conditions might be required for you to access certain Reporting features or content.

Requirements for Reporting features and content

The following table describes the permissions and other conditions to check if you cannot access certain Reporting features or content.

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Requirements for Reporting features and content

Feature	Permissions
Reporting workbench	You require **Report API** permission to view the Reporting workbench.
Data sources	In reports, the **Explore Data** page, or the Endpoint Details page (sensor details panel), sensors are available to select as data sources only if they meet all the following criteria: • The sensors are registered with Tanium Data Service (TDS), TDS has harvested the sensor data at least once, and the data is cached. For more information, see Tanium Interact User Guide: Register or unregister sensors for collection. • You have **Sensor read** permission for the content set to which the sensors are assigned. If you do not have that permission, the sensors do not appear on the Interact **Registration and Collection** page, where you register sensors with TDS. • The sensor must be configured as visible, not hidden. For more information, see Tanium Console User Guide: Hide this sensor from sensor lists and parse results. • The sensor must not be in the list of unavailable sensors. For more information, see Unavailable sensors in Reporting on page 171. You require Tanium solution-specific permissions to view sources of data that are not present on endpoints. For example, Tanium Impact module permissions are required to view the the **Impact Rating** data source. The Tanium solutions that you have installed determine which Module sources on page 14 are available in your Tanium environment. You require **Reporting Metrics Source read** permission on the content sets of module sources to select those sources for dashboard charts.
Reports	You require **Report read** permission for a content set to see the reports in that set. As an example, **Report read** permission for the **Reporting** content set enables you to see the **ADI - Basic Inventory** report.
Dashboards	You require **Dashboard read** permission for a content set to see the dashboards in that set. As an example, **Dashboard read** permission for the **Certificate Manager** content set enables you to see the **Certificate Manager** dashboard. If you can see a dashboard but its charts do not load or are missing historical data, see: • Dashboards do not load charts or exports fail on page 174 • Dashboard charts do not show historical data on page 174
Endpoint Details page	You require **Dashboard read** permission for the **Reporting** content set to see tabs on the Endpoint Details page. Certain tabs and tab contents require additional permissions. For example, if you do not have permissions for a particular panel in a tab, it might show **No Results** instead of the expected data. For more information, see Permissions for Endpoint Details page on page 37. If you can see a tab and its panels but data is missing for certain fields, see Endpoint Details page shows empty fields on page 177.

Unavailable sensors in Reporting

Certain sensors, such as sensors that provide duplicate data, are intentionally unavailable in Reporting, even if you register the sensors in TDS. Expand the following section to view a list of sensors that are unavailable in Reporting.

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Unavailable sensors in Reporting

- Client Extensions - Installed Extensions
- Compliance Rule Failures
- Comply - Compliance Exposure Score
- Comply - Compliance Findings
- Comply - Compliance Results
- Comply - Compliance Status
- Comply - CVE Findings
- Comply - NMap Scan Results
- Comply - Oval Findings
- Comply - Vulnerability Results
- Comply - Vulnerability Status
- Computer Groups
- Discover - Is Unmanageable
- Discover Label
- Discover Location
- Discover Method
- Discover Profile

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- Discover Satellite
- Domain Member
- EID Last Changed
- Impact - Active User Session SIDs
- Impact - Administrator SIDs
- Impact - Computer Domain SID
- Impact - Physical NetBIOS Computer Name
- Is AIX
- Is Linux
- Is Mac
- Is Solaris
- Is Windows
- Last Discovered
- Map - Endpoint Health
- Number of Fixed Drives
- Online
- Patch - Patch List Applicability
- Unmanaged Assets

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- x64/x86?

Dashboards do not load charts or exports fail

You might observe the following issues for a dashboard that has numerous chart panels:

- When you view the dashboard, panels do not load because they exceed the loading timeout.
- The dashboard export process fails because it exceeded the export timeout.

If you encounter these issues, contact Tanium Support for help adjusting the settings that control the timeout intervals. For more information, see Contact Tanium Support on page 179.

Dashboard charts do not show historical data

If a dashboard chart that is based on a report does not show historical (non-current) data, investigate the following potential causes.



For more information about how Reporting collects historical data for report-based charts, see Overview of historical data collection for report-based charts on page 137.

The following troubleshooting tips and procedures do not apply to dashboard charts that are based on Module sources on page 14. The Tanium solutions that provide module sources also provide their historical data. To troubleshoot solutions, see the corresponding user guides on the Tanium Resource Center.

Data is unavailable for timeframe

Reporting might require more time to collect all the chart data for Timeframe on page 99 specified in the dashboard or the Date/Timeframe on page 114 specified in the chart. For each chart, data collection starts when you add it to a dashboard and save the dashboard. For example, if you configure a line chart with a **Timeframe** of **Last 7 Days**, initially the chart shows only the current data, and seven days must pass before it shows data for that full date range.

When you view the dashboard and select a **Timeframe** that overrides the configured value for the chart, the chart cannot show data for the new date range if it precedes the date when collection started for the chart. For the preceding example chart, if collection started on June 21 and you select a **Timeframe** of **Last 30 Days** on June 30, the chart does not show data for the days before June 21.

Changes to chart settings

If you select a different report for an existing dashboard chart, or change any of the following chart settings, and then re-save the dashboard, Reporting starts a new collection because that new combination of settings comprises a new source:

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- **Group By Column**
- **Aggregate**
- **Group Tanium Errors**
- **Filter Group**
- **Source** filter

If no other charts use the previous source, Reporting stops collecting data for the previous source after 10 days and removes the collected data. For more information, see Chart data sources on page 137.

Data collection failures

Reporting automatically collects chart data every 24 hours for each source that provides the data. A chart shows the Disabled icon if collection is disabled for the source, in which case the chart shows only the current data, not historical data. Hover over the icon to show a tooltip that describes the reason why collection is disabled. If you are assigned the **Administrator** reserved role, you can click the icon to open the **Source Details** page, which provides information that can help you troubleshoot collection issues for the source (see View historical data sources on page 138). If you are assigned the **Reporting Historical Sources** permission, you can perform the following step to view the source details:

1. From the Main menu, go to **Data > Settings > Historical Data Sources**.
2. Click the **Status** column header to sort the grid by status.
3. Determine whether any source with `Failed` status provides data for the chart that is missing data. You can match a source to a chart based on the source name, as described under Source on page 139.
4. Expand a source to see the error message that is associated with a failed collection.
5. If collection is disabled, hover over the Disabled icon in the **Last Run** column to show a tooltip that describes the reason.
6. (Optional) Click the name of a source to view its details. For more information, see View historical data sources on page 138.

The following sections list common collection issues and corrective tasks.

COLLECTION DISABLED DUE TO **GROUP BY COLUMN** SELECTION

Issue: Reporting disabled collection because the **Group By Column** sensor for the associated dashboard chart returns a result with more than 50 values for a single row. This might happen if the chart is based on a report that does not flatten the **Group By Column** sensor that is selected for the chart.

Solution: Manually running the collection might resolve the issue (see Run data collections on page 141). Otherwise, edit the chart (see Edit dashboards on page 103) to perform one of the following steps:

- Update the **Group By Column** to use a column from the sensor by which the report is flattened.
- Modify which sensor the report is flattened by to match the **Group By Column** sensor that the chart uses.

COLLECTION DISABLED DUE TO MISSING CONTENT

Issue: Reporting disabled collection because the source depends on a sensor, content set, or solution that is not present in the Tanium environment.

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Solution: Tanium Cloud automatically imports Tanium-provided content. On the **Historical Data Sources** page, expand the source to read the error message that is associated with the failed collection to determine which content is missing. Contact Tanium Support for help restoring the content. For more information, see Contact Tanium Support on page 179.On the **Historical Data Sources** page, expand the source to read the error message that is associated with the failed collection to determine which content is missing. You can then import the content if it is available in another Tanium environment or recreate the content (sensors and content sets only):

- Import content: To export content from one environment and import that content into another environment, see Tanium Console User Guide: Managing Tanium solutions.
- Create content: For more information, see Tanium Console User Guide: Managing content.

USER DISABLED COLLECTION

Issue: A user disabled collection for the source.

Solution: Re-enable collection as described in Disable or enable data collections on page 141.

SOLUTION DISABLED COLLECTION

Issue: A Tanium solution disabled collection for the source. For example, Tanium™ Engage might disable collections for a survey that has ended.

Solution: Tanium solutions might disable collections for valid reasons. For example, Tanium™ Engage might disable collections for a survey that has ended. If you have doubts about the reason, examine the solution operation that used the collection. For more information about operations for a particular solution, go to the Tanium Resource Center, go to the **Learn About Products** section, click the solution name, and click **User Guide**.

COLLECTION DISABLED DUE TO EXCESS FAILED ATTEMPTS

Issue: Collection is disabled due to too many consecutive failed collection attempts.

Solution: On the **Historical Data Sources** page, expand the source to read the error messages that are associated with the failed collection attempts to determine if they have a common cause.

COLLECTION FAILED BECAUSE RESULT ROWS EXCEED THE LIMIT

Issue: Collection failed because the source report returned more than the maximum of 500,000 results rows for historical collection.

Solution: Try applying filters to the source report to reduce the number of result rows. For the steps, see Filter data on page 50.

LONG COLLECTION DURATIONS

Issue: Slow collections for some sources delay collections for other sources

Solution: Long collection run times for some sources might delay collections for other sources. You can check collection run times on the **Historical Data Sources** page (see Average Collection Duration on page 139). If the collection duration for a source differs greatly from other sources or exceeds one hour, the source report might have the following issues:

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- Too many filters

  Reconsider which filters are necessary and whether you can consolidate any. To reconfigure report filters, see Filter data on page 50.

- Overly complicated filters

  For example, a report might have several layers of nested filters. Filters with complex regular expressions might also affect collection duration, as described in Tanium Console User Guide: Processing limits for regular expressions.

- Too much data

  Consider adding filters to reduce the report results to just what is relevant. Factors that might cause excessive data collection include:

  - Multi-value columns: The report has too many columns that individually provide multiple values from each endpoint. The **Name** and **Version** columns of the **Installed Applications** sensor are examples of such columns.
  - High cardinality sensors: The report has too many sensors with high cardinality. For example, the **IP Address** sensor returns a unique result from each endpoint and therefore has higher cardinality than the **Operating System** (OS) sensor, which returns the same result for all endpoints that have the same OS.

- Too many computer groups

  Reporting runs a collection for each computer group that is selected for collection. Reconsider which computer groups are necessary, consolidate groups if appropriate, and adjust the groups that are selected for collection. For more information, see Select computer groups for data collection on page 46.

Dashboard action panels with no affected endpoints

When you hover over a disabled action panel button, the `No Affected Endpoints` message appears. This message indicates that Reporting cannot identify any endpoints that meet the criteria required to deploy the action or run the playbook.

In some cases, this message is accurate because there are no affected endpoints. However, you might also see this message for other reasons. The following are some reasons why you might see this message:

- Insufficient access permissions

  Ensure that you have access to the underlying report, its data sources, and the computer management groups. Contact your administrator for additional permissions.

- Report filters exclude all endpoints

  Review and adjust report filters to ensure they are not overly restrictive and unintentionally excluding all endpoints.

- Data is unavailable

  Verify that endpoints are online, reporting the expected data, and that data sources are up to date.

Endpoint Details page shows empty fields

When you view the details for a single endpoint, some fields might be empty or contain the message **No Data Available**. The following are some reasons why fields might not contain data.

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- **Sensor imports**: Reporting uses registered sensors in TDS to retrieve the details for a single endpoint. If a sensor is not imported on the Tanium Server, the fields that the sensor provides do not contain data. To import sensors and other content, see Tanium Console User Guide: Managing Tanium solutions.
- **Sensor registration**: If a sensor is not registered with TDS, the fields that the sensor provides do not contain data. To register sensors with TDS, see Tanium Interact User Guide: Register or unregister sensors for collection.
- **Sensor quarantines**: If the sensor is quarantined, the fields that the sensor provides do not contain data. For more information about quarantined sensors, see Tanium Console User Guide: Managing sensor quarantines.
- **Sensor permissions**: If you do not have RBAC permissions to use the sensor, the corresponding fields that the sensor provides do not contain data. Contact your administrator for additional permissions. For more information, see Tanium Console User Guide: Content management permissions.
- **Endpoint Details permissions**: If you do not have permission to access content on the Endpoint Details tabs, you might see **No Results** in affected panels. For more information, see Permissions for Endpoint Details page on page 37.

Import issues for dashboards and reports

If Reporting indicates missing content, name conflicts, or other issues when you import dashboards or reports, see the troubleshooting tasks for the import procedures:

- Import dashboards on page 132
- Import reports on page 80

Uninstall Reporting

When you uninstall Reporting, any collected data is saved by default so that you can restore the data if you later decide to reinstall Reporting. If you want to start fresh without data to restore, you must manually delete some files after uninstalling Reporting.

What happens when you uninstall Reporting?

When you uninstall Reporting, Tanium Console removes:

- Reporting workbench
- Reporting-related configuration objects (reports and dashboards)
- Reporting service

To support data restoration, the uninstallation procedure does not remove:

- Collected data at `<Tanium Module Server>\services\reporting-files\`
- Exported reports
- Data sources
- Reporting content set

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Uninstall Reporting

1. Sign in to Tanium Console as a user with the Administrator role.
2. From the Main menu, go to **Administration > Configuration > Solutions**.
3. In the **Content** section, select the checkbox for Reporting and click **Uninstall**.
4. Review the summary and click **Uninstall**.

   IMPORTANT

   If you want to preserve Reporting data for a future reinstallation, skip the remaining steps.

5. Manually delete the Reporting files under `<Tanium Module Server>\services\reporting-files\`.

NOTE

In an active-active deployment, the Reporting workbench and Reporting menu remain on the cluster member where you did not perform the uninstallation. The Reporting workbench must be manually removed from that member. Contact Tanium Support on page 179 for assistance. For more information about active-active deployments, see the guide for your Tanium infrastructure:

- **Tanium Appliance**: Tanium Appliance User Guide: Configuring a Tanium cluster
- **Windows**: Tanium Core Platform Deployment for Windows: Installing Tanium Servers in an active-active HA cluster

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: Chart types and dates

In Reporting, charts provide a visualization of data. In a dashboard, each chart panel derives its data from a report or a module source (see Add chart panels on page 106). You an also add a chart within a report (see Configure a chart on page 66). The following sections describe the chart types and, for dashboards, the date options that you can select when configuring a chart.

Chart types

Dashboards support all the following chart types. Reports support only donut charts and vertical bar charts.

- Area chart on page 180
- Donut chart on page 181
- Line chart on page 182
- Number chart on page 183
- Table chart on page 184
- Vertical bar chart on page 185

NOTE

In the following sections, the example images show the same chart in two sizes. The size determines how much data the chart shows. On a dashboard, you can resize charts as described in Resize panels on page 105. In a report, the chart automatically sizes to the width of the report.

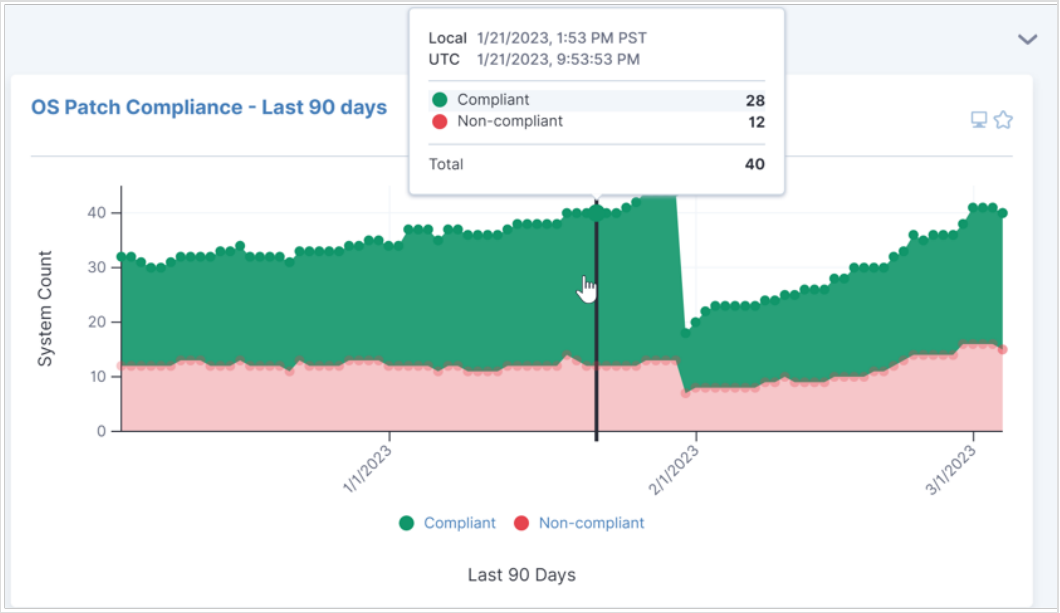
Area chart

The area chart is a historical chart that shows data over multiple times. Use the area chart when you want to sort and compare changes over time, such as showing running applications on the endpoints. The Y axis shows an area of a different color for each unique result of the **Group By Column** selection for the associated report or the **Group By** selection for the associated module source (see Panel settings: basic on page 107). The X axis shows a point (dot) for each collection run at the top of the area for each result. Collections occur at 24-hour intervals for reports and vary by Tanium solution for module sources. The chart hides the points to avoid clutter if they exceed 200 across both the X and Y axes.

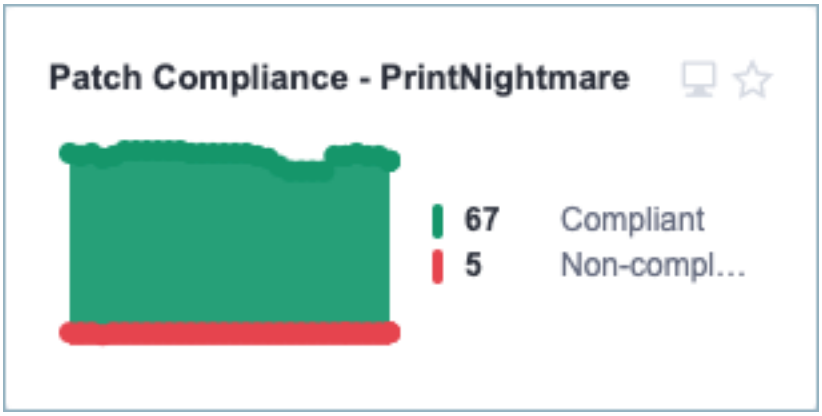
Hover over a result on any date in the chart to show the count for each result and the total count for all results on that date, as shown in the following chart. In a dashboard chart that is based on a report, click a result to open the report with the result applied as a filter. For example, if you click the `Compliant` result for the date 1/21/2023 in the following chart, the associated report opens and shows only the results from compliant endpoints for that date.

Example of an area chart (medium)

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Example of an area chart (small)

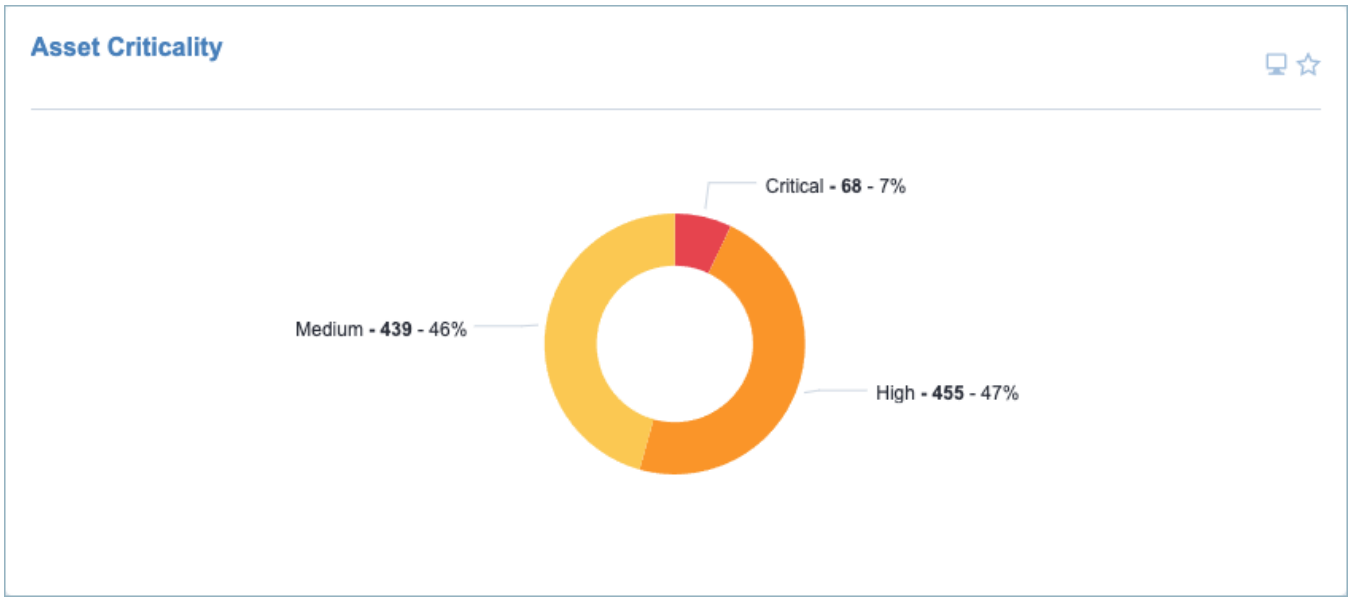


Donut chart

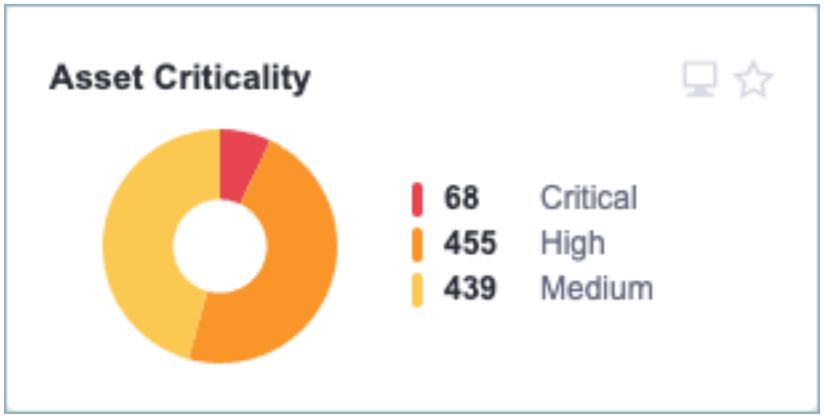
The donut chart displays data for a single point of time. Use a donut chart when you want to see or compare shares of a whole, such as displaying the percent of machines that run a specific operating system.

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Example of a donut chart (medium)



Example of a donut chart (small)



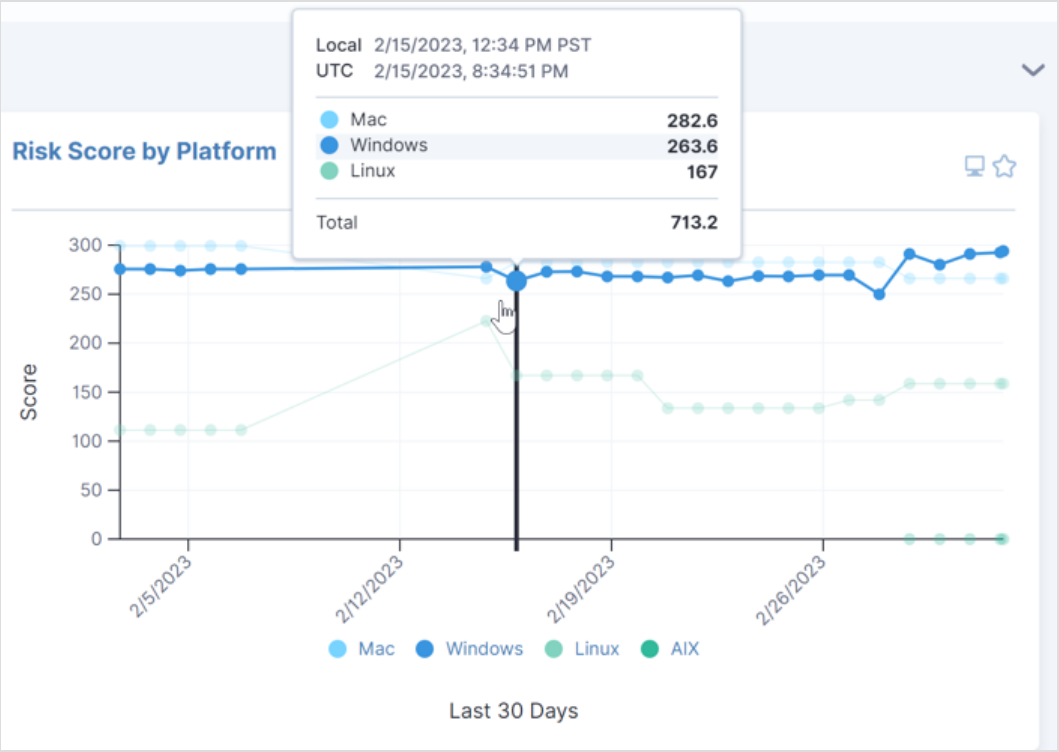
Line chart

The line chart is a historical chart that shows data over multiple times. Use the line chart when you compare values over time. The Y axis shows a line of a different color for each unique result of the **Group By Column** selection for the associated report or the **Group By** selection for the associated module source (see Panel settings: basic on page 107). The X axis shows a point (dot) for each collection run at the top of the line for each result. Collections occur at 24-hour intervals for reports and vary by Tanium solution for module sources. The chart hides the points to avoid clutter if they exceed 200 across both the X and Y axes.

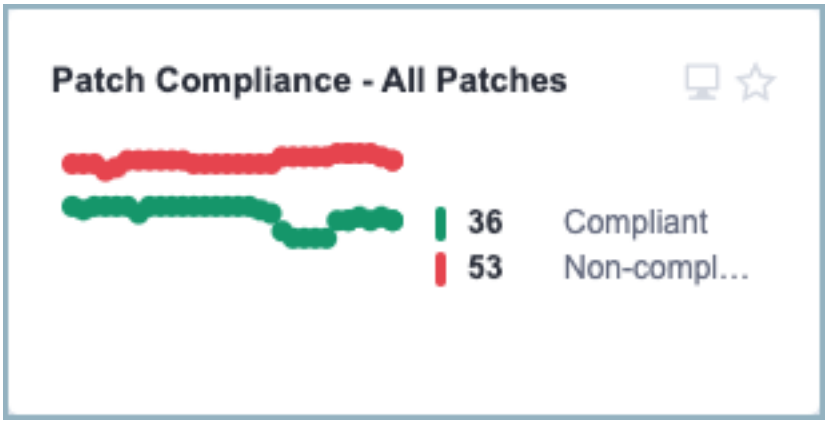
Hover over a result on any date in the chart to display the count for each result and the total count for all results on that date, as shown in the following chart. In a dashboard chart that is based on a report, click a result to open the report with the result applied as a filter. For example, if you click the `Windows` result for the date 2/15/2023 in the following chart, the associated report opens and shows only the results from Windows endpoints for that date.

Example of a line chart (medium)

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Example of a line chart (small)

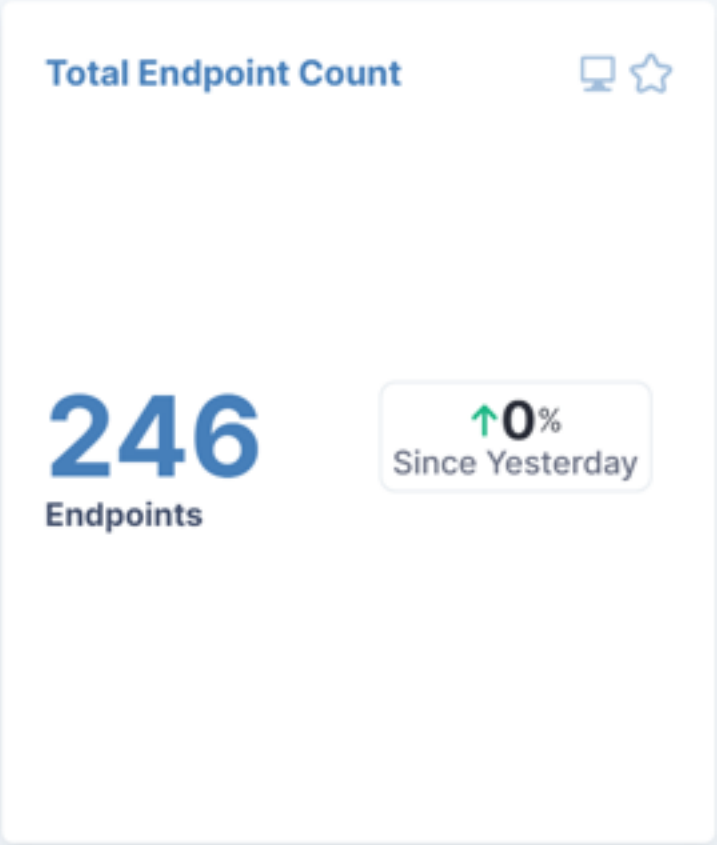


Number chart

The number chart displays a single value, such as a count or a percent. Use the number chart to display a current value that provides an overview of state. For example, use a number chart to show the percentage of endpoints that are currently online, or to show the number of endpoints that require a patch. A number chart can contain a trend indicator to show the change in value from a previous point in time.

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Example of a number chart (medium)



Example of a number chart (small)

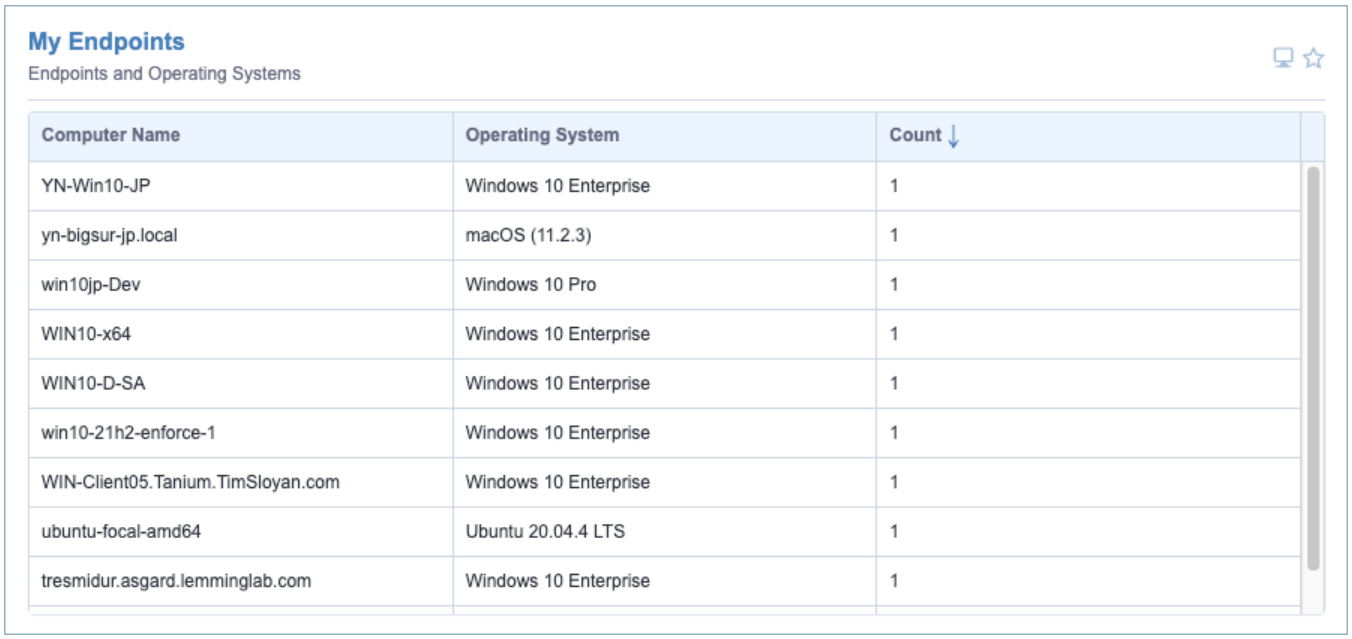


Table chart

The table chart contains data in a table format, similar to a report. Use a table chart when you want to show report data in a table format on a dashboard.

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Example of a table chart (medium)

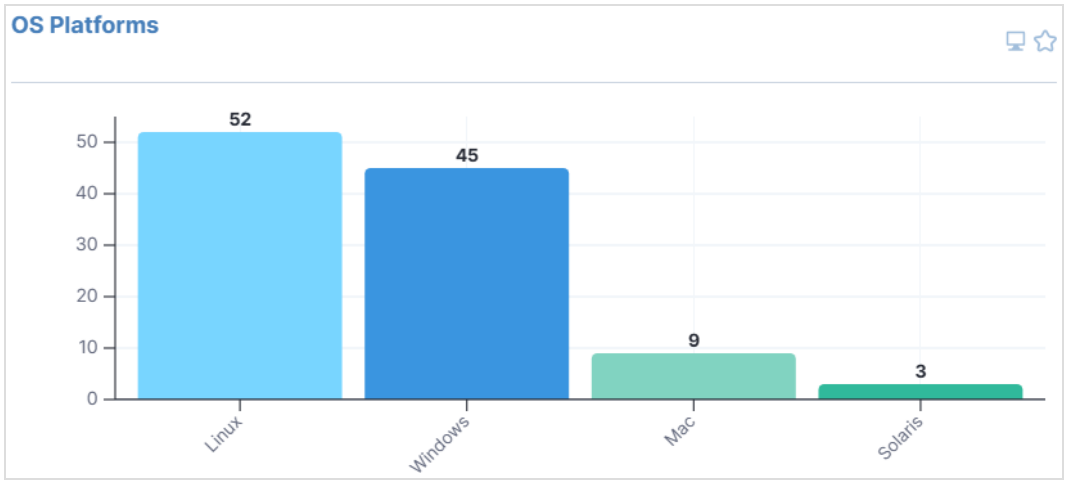


Computer Name	Operating System	Count
YN-Win10-JP	Windows 10 Enterprise	1
yn-bigsur-jp.local	macOS (11.2.3)	1
win10jp-Dev	Windows 10 Pro	1
WIN10-x64	Windows 10 Enterprise	1
WIN10-D-SA	Windows 10 Enterprise	1
win10-21h2-enforce-1	Windows 10 Enterprise	1
WIN-Client05.Tanium.TimSloyan.com	Windows 10 Enterprise	1
ubuntu-focal-amd64	Ubuntu 20.04.4 LTS	1
tresmidur.asgard.lemminglab.com	Windows 10 Enterprise	1

Vertical bar chart

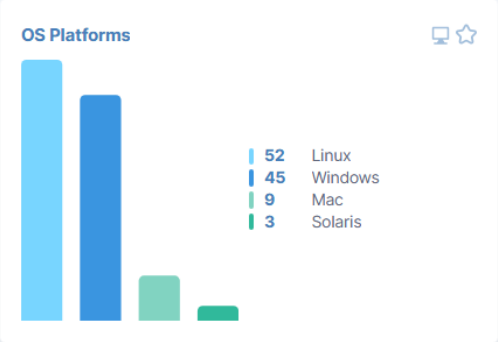
The vertical bar chart, or histogram, displays data for a single point in time. Use a vertical bar chart when you want to compare two or more results, such as comparing browser versions or operating systems. In contrast to donut charts, the parts of a vertical bar chart do not necessarily add up to a whole. The following bar chart shows the results of the **OS Platform** sensor.

Example of a vertical bar chart (medium)



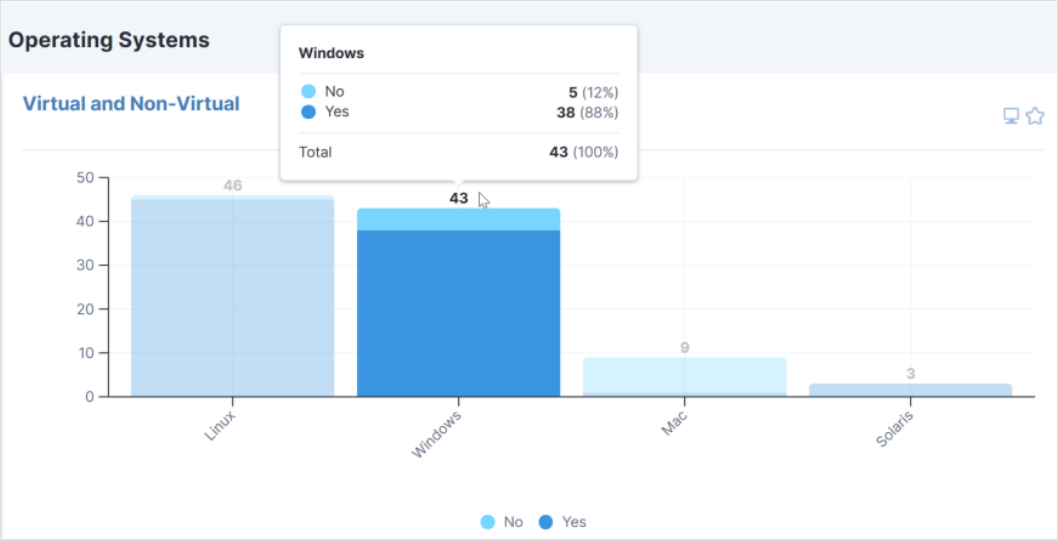
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Example of a vertical bar chart (small)



Optionally, you can divide each bar into segments, where each segment represents a unique value from an additional sensor. The following chart shows a bar for each unique result of the **OS Platform** sensor (Linux, Windows, Mac, or Solaris) and shows, within each bar, a segment for each unique result of the **Is Virtual** sensor (`Yes` or `No`).

Example of a vertical bar chart (medium)



Filter line and area charts by computer group

You can filter dashboards by computer groups using the **Computer Group** filter. The listed computer groups are sorted into the following sections based on whether the groups are configured for historical data collection:

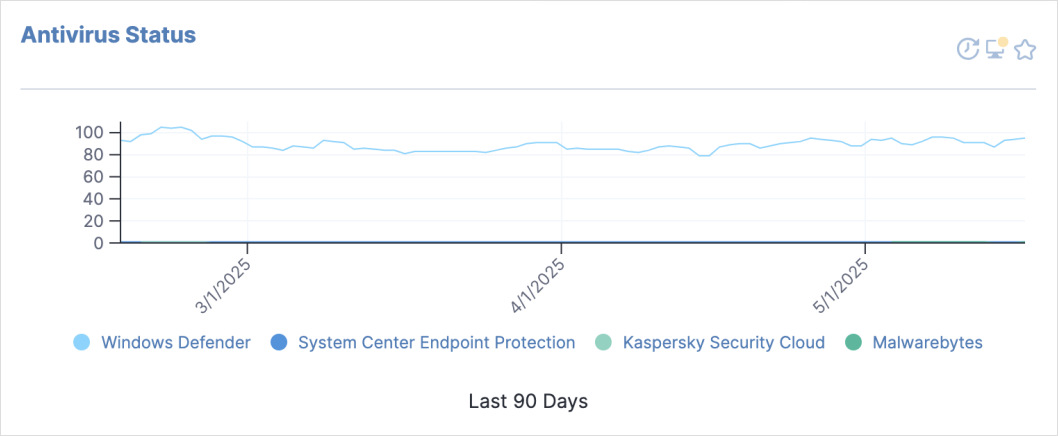
- **Historical Collection Enabled**: Includes computer groups selected for data collection. If you choose a computer group from this section, both historical and current data appear in line and area charts. In these charts, the Current Timeframe icon is disabled and appears dimmed.
- **Current Data Only**: Includes computer groups not selected for data collection. If you choose a computer group from this section, only current data appears in line and area charts. In these charts, the Current Timeframe icon is enabled.

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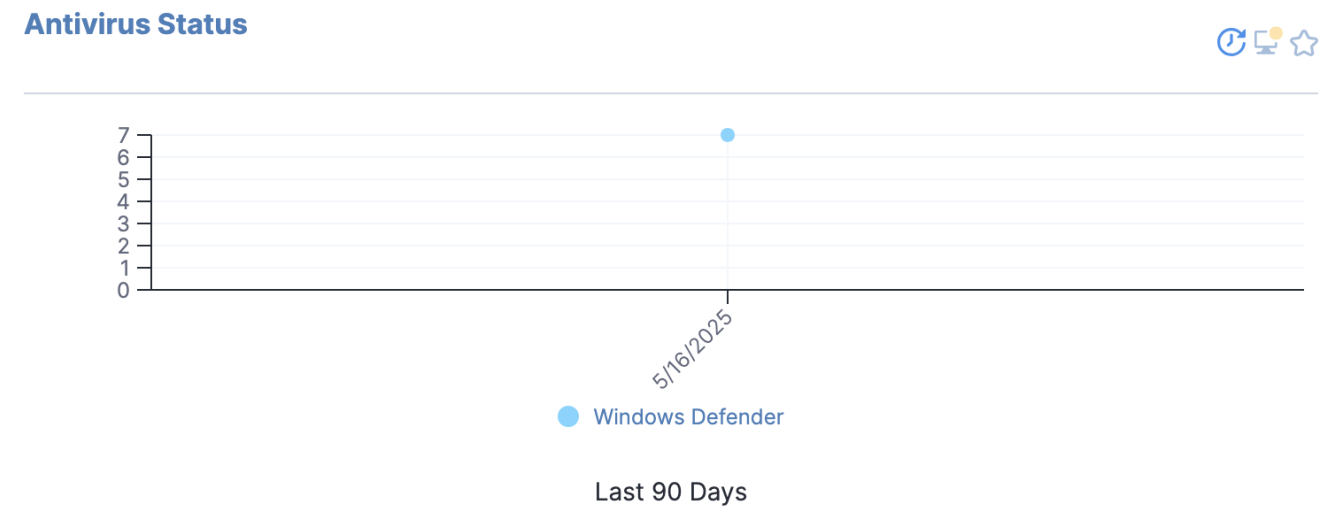
The available groups depend on your management group rights. To view historical data, you must have explicit rights to the selected computer group. For example, if `All Linux` is configured for data collection, but you only have access to `All Debian`, you will not see any historical data. However, you can still view current data from `All Linux`, filtered by your management rights. This means you will see `Debian` systems.

For more information, see Select computer groups for data collection on page 46 and Computer Group on page 98.

Example of a line chart with historical and current data



Example of a line chart with only current data



Date options

When you add charts to a dashboard, the date options that you can select for the chart data vary by chart type:

- One-day charts, such as donut charts and vertical bar charts, display data for a single point in time (date).
- Historical charts, such as area charts and line charts, display a date range (timeframe).

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In the dashboard chart configuration, you select a date option in the **Date** or **Timeframe** fields (see Date/Timeframe on page 114). When you view charts on an existing dashboard, you can select a dashboard-level **Timeframe** that overrides the **Date** or **Timeframe** in the chart configurations (see Working with Reporting dashboards on page 92).

For more information about how Reporting collects data for the dates that you select in dashboard charts, see Overview of historical data collection for report-based charts on page 137 and Module sources on page 14.



All dates are local to the time zone of the Tanium Module Server, unless otherwise noted.

Date options for one-day charts

The following date options are available for donut charts, number charts, table charts, and vertical bar charts:

Date options for one-day charts

Option	Description
Current	Current results from Reporting collecting data for the source.
Custom	Select a day to view results from the last time Reporting collected data on that day. This option uses the time of your local machine.
Yesterday	Results from the last time Reporting collected data on the previous day.
This Day Previous Week	Results collected on this day one week ago.
This Day Previous Month	Results collected on this day one month ago. For example, if today is March 1st, the results are from February 1st. If the day does not exist in the previous month, such as June 31st, results are shown from the last day of month (June 30).
This Day Previous Quarter	Results collected on this day three months ago.

Date range options for historical charts

The following date range options are available for area charts and line charts:

Date range options for historical charts

Option	Description
Custom	Select the start date and end date of a date range. The start date and end date cannot be the same date. This option uses the time of your local machine.
This Week	Daily results beginning with the most recent Sunday through the current day.
Previous Week	Daily results beginning with the previous Monday through the most recent Sunday.
Previous Business Week	Daily results beginning with the previous Monday through the most recent Friday.

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Date range options for historical charts (continued)

Option	Description
Last 7 Days	Last 7 daily results, including the current day.
This Month	Daily results beginning with the first of the month through the current day.
Previous Month	Daily results for the previous month.
Last 30 Days	Last 30 daily results, including the current day.
This Quarter	Daily results for a quarter beginning January 1st, April 1st, July 1st, or October 1st, through the current day.
Previous Quarter	Daily results for the previous quarter. A quarter is January 1st to March 31, April 1st to June 30th, July 1st to September 30, or October 1st to December 31st.
Last 90 Days	Last 90 daily results, including the current day.
Last 365 Days	Last 365 daily results, including the current day.

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Reference: Gateway examples for Reporting

Tanium Gateway provides a GraphQL API integration point for Tanium solutions, including Reporting. Reporting queries and mutations retrieve reports or report results, export and import report definitions, and delete reports and Reporting dashboards.

For more information about Gateway example syntax, see Tanium Gateway User Guide: Reference: Filter syntax and Tanium Gateway User Guide: Reference: Gateway examples.

Reporting query filter syntax

Reporting queries support the following filter fields:

- `authorNames`
- `contentSetNames`
- `createdAfter`
- `createdBefore`
- `labels`
- `moduleNames`
- `text`

For more information on syntax, see `reportFieldFilter` in the **Documentation Explorer** pane of the query explorer.

Report author

You can filter reports based on the author name. Define a filter object using the syntax:

```
{authorNames: [name-1, name-2, name-...n]}
```

For example, the following request filters and returns only report definitions whose author is either `testadmin-1` or `testadmin-2`:

```
query exampleGetReportsByAuthor($author1: String!, $author2: String!) {
  reports(filter: {authorNames: [$author1, $author2]}) {
    edges {
      node {
        id
      }
    }
  }
```

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```
}
```

Include the count and time variables in the **Variables** panel or in your variables dictionary:

```
{
  "author1": "testadmin-1",
  "author2": "testadmin-2"
}
```

Content set membership

You can filter reports based on the report content set membership. Define a filter object using the syntax:

```
{contentSetNames: [content-set-name-1, content-set-name-2, content-set-name-...n]}
```

If you define multiple solutions, a report only needs to match one of the content sets to pass the filter.

For example, the following request filters and returns only report definitions belonging to the Base or Default content sets:

```
query exampleGetReportsByContentSet($contentSet1: String!, $acontentSet2: String!) {
  reports(filter: {contentSetNames: [$contentSet1, $contentSet2]}) {
    edges {
      node {
        id
      }
    }
  }
}
```

Include the content set variables in the **Variables** panel or in your variables dictionary:

```
{
  "contentSet1": "Base",
  "contentSet2": "Default"
```

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```
}
```

Creation time

You can filter reports based on the report creation time, either before or after a specified time. To filter reports created before a specified time, define a filter object using the syntax:

```
{createdBefore: rfc-3339-time}
```

For example, the following request filters and returns only report definitions created before 2022-01-01T00:00:00Z:

```
query exampleGetReportsBefore($timeBefore: Time) {
  reports(filter: {createdBefore: $timeBefore}) {
    edges {
      node {
        id
      }
    }
  }
}
```

Include the timestamp variable in the **Variables** panel or in your variables dictionary:

```
{
  "timeBefore": "2022-01-01T00:00:00Z"
}
```

To filter reports created after a specified time, define a filter object using the syntax:

```
{createdAfter: rfc-3339-time}
```

For example, the following request filters and returns only report definitions created after 2022-01-01T00:00:00Z:

```
query exampleGetReportsAfter($timeAfter: Time) {
```

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```
  reports(filter: {createdAfter: $timeAfter}) {
    edges {
      node {
        id
      }
    }
  }
}
```

Include the timestamp variable in the **Variables** panel or in your variables dictionary:

```
{
  "timeAfter": "2022-01-01T00:00:00Z"
}
```

Report labels

You can filter reports based on the associated labels. Define a filter object using the syntax:

`{labels: [label-1label-1, label-2, label-...n]}`

If you define multiple labels, a report only needs to match one of the labels to pass the filter.

For example, the following request filters and returns only report definitions with a label of `testlabel-1` or `testlabel-2`:

```
query exampleGetReportsByLabel($label1: String!, $label2: String!) {
  reports(filter: {labels: [$label1, $label2]}) {
    edges {
      node {
        id
      }
    }
  }
}
```

Include the label variables in the **Variables** panel or in your variables dictionary:

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```
{
  "label1": "testlabel-1",
  "label2": "testlabel-2"
}
```

Associated Tanium solution

You can filter reports based on the associated Tanium solution. Define a filter object using the syntax:

```
{moduleNames: [solution-1, solution-2, solution-...n]}
```

If you define multiple solutions, a report only needs to match one of the solutions to pass the filter.

For example, the following request filters and returns only report definitions associated with Tanium Interact or Tanium Asset:

```
query exampleGetReportsBySolution($solution1: String!, $solution2: String!) {
  reports(filter: {moduleNames: [$solution1, $solution2]}) {
    edges {
      node {
        id
      }
    }
  }
}
```

Include the solution name variables in the **Variables** panel or in your variables dictionary:

```
{
  "solution1": "Tanium Interact",
  "solution2": "Tanium Asset"
}
```

Name or description text

You can filter reports based on text in the report name or report description. Define a filter object using the syntax:

```
{text: text-string}
```

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For example, the following request filters and returns only report definitions that have `test-string` either in the name or the definition:

```
query exampleGetReportsByText($text: String) {
  reports(filter: {text: $text}) {
    edges {
      node {
        id
      }
    }
  }
}
```

Include the text variable in the **Variables** panel or in your variables dictionary:

```
{
  "text": "test-string"
}
```

Delete a report by ID

`mutation.reportDelete`

DELETE A REPORT BY ID

The `reportDelete` mutation requires Reporting 1.32 or later and the **Report** write permission.

The following mutation deletes the report that matches the referenced ID.

```
mutation exampleDeleteReport($id: ID!) {
  reportDelete(ref: {id: $id}) {
    id
    error {
      message
      retryable
      timedOut
```

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```
    }
  }
}
```

Include the report ID variable in the **Variables** panel or in your variables dictionary.

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef"
}
```

Example response:

```
{
  "data": {
    "reportDelete": {
      "id": "12345678-90ab-cdef-1234-567890abcdef",
      "error": null
    }
  }
}
```

Delete a Reporting dashboard by ID

`mutation.reportingDashboardDelete`

DELETE A REPORTING DASHBOARD BY ID

The `reportingDashboardDelete` mutation requires Reporting 1.32 or later and the **Dashboard** write permission.

The following mutation deletes the Reporting dashboard that matches the referenced ID.

```
mutation exampleDeleteReportingDashboard($id: ID!) {
  reportingDashboardDelete(ref: {id: $id}) {
    id
```

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```
    error {
      message
      retryable
      timedOut
    }
  }
}
```

Include the Reporting dashboard ID variable in the **Variables** panel or in your variables dictionary.

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef"
}
```

Example response:

```
{
  "data": {
    "reportingDashboardDelete": {
      "id": "12345678-90ab-cdef-1234-567890abcdef",
      "error": null
    }
  }
}
```

Get a report

`query.report`

GET A REPORT BY ID

The following query retrieves the report that matches the referenced ID.

```
query exampleGetReportByID($id: ID!) {
```

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```
  report(ref: {id: $id}) {
    id
    author {
      user {
        id
      }
      persona {
        id
      }
    }
    contentSet {
      id
    }
    createdTime
    description
    favorite
    labels
    lastModifiedBy {
      user {
        id
      }
      persona {
        id
      }
    }
    modifiedTime
    moduleName
    name
    viewDetails {
      columns {
        name
      }
    }
  }
}
```

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Include the report ID variable in the **Variables** panel or in your variables dictionary.

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef"
}
```

Example response:


```
{
  "data": {
    "report": {
      "id": "12345678-90ab-cdef-1234-567890abcdef",
      "author": {
        "user": {
          "id": "1"
        },
        "persona": {
          "id": "0"
        }
      },
      "contentSet": {
        "id": "21"
      },
      "createdTime": "2022-01-01T05:33:35.838686969Z",
      "description": "",
      "favorite": false,
      "labels": null,
      "lastModifiedBy": {
        "user": {
          "id": "1"
        },
        "persona": {
          "id": "0"
        }
```


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```
      },
      "modifiedTime": "2022-06-01T05:33:35.838686969Z",
      "moduleName": null,
      "name": "Example report",
      "viewDetails": {
        "columns": [
          {
            "name": "Example report column"
          }
        ]
      }
    }
  }
}
```

Get the ID of a report

`query.reports`

GET AN ID OF A REPORT

The following query retrieves reports that have the text "Example report" in the name or description, and returns the ID for each report.

```
query exampleGetReportIDs($first: Int, $text: String) {
  reports(first: $first, filter: {text: $text}) {
    edges {
      node {
        id
        description
        name
      }
    }
  }
}
```

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Include the pagination and text variables in the **Variables** panel or in your variables dictionary.

```
{
  "first": 2,
  "text": "Example report"
}
```

Example response:

```
{
  "data": {
    "reports": {
      "edges": [
        {
          "node": {
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "description": "Example description",
            "name": "Example report"
          }
        },
        {
          "node": {
            "id": "abcdef12-3456-7890-abcd-ef1234567890",
            "description": "Example report 2",
            "name": "Report example"
          }
        }
      ]
    }
  }
}
```

Get multiple reports

`query.reports`

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GET REPORTS

The following query retrieves the first 2 reports.

```
query exampleGetReports($first: Int) {
  reports(first: $first) {
    edges {
      node {
        id
        author {
          user {
            id
          }
          persona {
            id
          }
        }
        contentSet {
          id
        }
        createdTime
        description
        favorite
        labels
        lastModifiedBy {
          user {
            id
          }
          persona {
            id
          }
        }
        modifiedTime
        moduleName
        name
```

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```
        }
      }
    }
}
```

Include the pagination variable in the **Variables** panel or in your variables dictionary.

```
{
  "first": 2
}
```

Example response:

```
{
  "data": {
    "reports": {
      "edges": [
        {
          "node": {
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "author": {
              "user": {
                "id": "1"
              },
              "persona": {
                "id": "0"
              }
            },
            "contentSet": {
              "id": "21"
            },
            "createdTime": "2022-01-01T05:33:35.838686969Z",
            "description": "Example description",
```

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```
            "favorite": false,
            "labels": null,
            "lastModifiedBy": {
              "user": {
                "id": "1"
              },
              "persona": {
                "id": "0"
              }
            },
            "modifiedTime": "2022-03-17T05:33:35.838686969Z",
            "moduleName": null,
            "name": "Example report"
          }
        },
        {
          "node": {
            "id": "abcdef12-3456-7890-abcd-ef1234567890",
            "author": {
              "user": {
                "id": "2"
              },
              "persona": {
                "id": "1"
              }
            },
            "contentSet": {
              "id": "123"
            },
            "createdTime": "2022-01-01T19:58:08.175603337Z",
            "description": "Example report 2",
            "favorite": false,
            "labels": null,
            "lastModifiedBy": {
```


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```
                "user": {
                  "id": "3"
                },
                "persona": {
                  "id": "0"
                }
              },
              "modifiedTime": "2022-06-01T19:58:08.175603337Z",
              "moduleName": null,
              "name": "Example report 2"
            }
          }
        ]
      }
    }
}
```


Get report result data

`query.reportResultData`

GET REPORT RESULTS BY REPORT ID

Using `reportResultData` in a request requires:

- Reporting 1.12.144 or later to submit the query
- Reporting 1.35.36 or later to use `query.reportResultData (summarize)` and `query.reportResultData.edges.node.count` to retrieve row counts in the response



The cursor refresh functionality (`query.reportResultData.collectionInfo.startCursor`, `query.reportResultData (refresh)` is deprecated and no longer functions. If a query request using `query.reportResultData` fails, resubmit the original query request at least 60 seconds after the initial failed response.

The following query retrieves column `values` for the first 2 report results, and summarizes the results by returning a `count` of duplicate rows. The query also retrieves report definition details, including report column `name`, `sourceName`, and `sourceColumnName`.

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```
query exampleGetReportResultData($id: ID!, $first: Int, $summarize: Boolean!) {
  reportResultData(id: $id, first: $first, summarize: $summarize) {
    edges {
      node {
        columns {
          values
        }
        count
      }
    }
    viewDetails {
      columns {
        name
        sourceName
        sourceColumnName
      }
    }
  }
}
```

Include the ID, pagination, and summary variables in the **Variables** panel or in your variables dictionary.

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef",
  "first": 2,
  "summarize": true
}
```

Example response:

```
{
  "data": {
    "reportResultData": {
```

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```
    "edges": [
      {
        "node": {
          "columns": [
            {
              "values": [
                "Npcap OEM"
              ]
            },
            {
              "values": [
                "1.10"
              ]
            },
            {
              "values": [
                "Windows 10 Enterprise"
              ]
            }
          ],
          "count": 10
        }
      },
      {
        "node": {
          "columns": [
            {
              "values": [
                "Microsoft Visual C++ 2013 Redistributable (x86) - 12.0.21005"
              ]
            },
            {
              "values": [
                "12.0.21005.1"
```


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```
                ]
              },
              {
                "values": [
                  "Windows 10 Enterprise"
                ]
              }
            ],
            "count": 10
          }
        }
      ],
      "viewDetails": {
        "columns": [
          {
            "name": "Name",
            "sourceName": "Installed Applications",
            "sourceColumnName": "Name"
          },
          {
            "name": "Version",
            "sourceName": "Installed Applications",
            "sourceColumnName": "Version"
          },
          {
            "name": "Operating System",
            "sourceName": "Operating System",
            "sourceColumnName": "Operating System"
          }
        ]
      }
    }
  }
}
```

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For reports with multiple results, you can retrieve a page of data and a page end cursor, then submit your request, defining `after` in the input equal to the page end cursor to retrieve the next page of results. You can repeat this until `hasNextPage` equals `false` in the response, signifying that no more pages of data exist.

The following query retrieves column `values` for the first 2 report results, and summarizes the results by returning a `count` of duplicate rows. This query also retrieves `hasNextPage`, to determine whether at least one more page of data exists, and `endCursor`, to pass this cursor value in a separate request and retrieve the next page of results.

```
query exampleGetPaginatedResultData($id: ID!, $first: Int, $summarize: Boolean!) {
  reportResultData(id: $id, first: $first, summarize: $summarize) {
    edges {
      node {
        columns {
          values
        }
        count
      }
    }
    viewDetails {
      columns {
        name
        sourceName
        sourceColumnName
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
  }
}
```

Include the ID, pagination, and summary variables in the **Variables** panel or in your variables dictionary.

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```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef",
  "first": 2,
  "summarize": true
}
```

Example response:

```
{
  "data": {
    "reportResultData": {
      "edges": [
        {
          "node": {
            "columns": [
              {
                "values": [
                  "example-endpoint-1"
                ]
              },
              {
                "values": [
                  "192.0.2.10"
                ]
              }
            ],
            "count": 1
          }
        },
        {
          "node": {
            "columns": [
              {
                "values": [
```

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```
                  "example-endpoint-2"
                ]
              },
              {
                "values": [
                  "192.0.2.20"
                ]
              }
            ],
            "count": 1
          }
        }
      ],
      "viewDetails": {
        "columns": [
          {
            "name": "Computer Name",
            "sourceName": "Computer Name",
            "sourceColumnName": "Computer Name"
          },
          {
            "name": "IP Address",
            "sourceName": "IP Address",
            "sourceColumnName": "IP Address"
          }
        ]
      },
      "pageInfo": {
        "hasPreviousPage": false,
        "hasNextPage": true,
        "startCursor": "MjMwNDUzOTM6MA==",
        "endCursor": "MjMwNDUzOTM6MQ=="
      }
    }
```


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```
  }
}
```

The following query defines `after` in the input equal to the prior `endCursor` value of `MjMwNDUzOTM6MQ==` to retrieve the next page of results.

```
query exampleGetPaginatedResultData($id: ID!, $first: Int, $after: Cursor, $summarize: Boolean!) {
  reportResultData(id: $id, first: $first, after: $after, summarize: $summarize) {
    edges {
      node {
        columns {
          values
        }
        count
      }
    }
    viewDetails {
      columns {
        name
        sourceName
        sourceColumnName
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
  }
}
```

Include the ID, pagination, and summary variables in the **Variables** panel or in your variables dictionary.

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```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef",
  "first": 2,
  "after": "MjMwNDUzOTM6MQ==",
  "summarize": true
}
```

Example response:

```
{
  "data": {
    "reportResultData": {
      "edges": [
        {
          "node": {
            "columns": [
              {
                "values": [
                  "example-endpoint-3"
                ]
              },
              {
                "values": [
                  "192.0.2.30"
                ]
              }
            ],
            "count": 1
          }
        },
        {
          "node": {
            "columns": [
              {
```

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```
                "values": [
                  "example-endpoint-4"
                ]
              },
              {
                "values": [
                  "192.0.2.40"
                ]
              }
            ],
            "count": 1
          }
        }
      ],
      "viewDetails": {
        "columns": [
          {
            "name": "Computer Name",
            "sourceName": "Computer Name",
            "sourceColumnName": "Computer Name"
          },
          {
            "name": "IP Address",
            "sourceName": "IP Address",
            "sourceColumnName": "IP Address"
          }
        ]
      },
      "pageInfo": {
        "hasPreviousPage": true,
        "hasNextPage": true,
        "startCursor": "MjMwNDUzOTM6Mg==",
        "endCursor": "MjMwNDUzOTM6Mw=="
      }
```


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```
      }
    }
  }
```

Export report definition

`query.reportExport`

EXPORT A REPORT BY ID

The following query exports the report definition that matches the referenced ID. You can import this definition using the `importReport` mutation.

```
query exampleExportReportDefinition($id: ID!) {
  reportExport(ref: {id: $id}) {
    reportDefinition
  }
}
```

Include the report ID variable in the **Variables** panel or in your variables dictionary.

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef"
}
```

Example response:

```
{
  "data": {
    "reportExport": {
```

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```
      "reportDefinition": "{\"id\":\"12345678-90ab-cdef-1234-567890abcdef\",
\"displayName\":\"Example Report\", \"description\":\"Example API Gateway Reporting
functionality\", \"contentSet\":{\"name\":\"Reporting\"}, \"sourceView\":{\"id\":\"source
data\", \"querySpec\":{\"hasChanged\":true, \"sources\":{\"Computer Name\":{\"id\":\"Computer
Name\", \"sensor\":{\"sensorName\":\"Computer Name\", \"flatten\":true}}, \"IP Address\":
{\"id\":\"IP Address\", \"sensor\":{\"sensorName\":\"IP Address\", \"flatten\":false}}},
\"selects\":[{\"id\":\"1\", \"sourceColumn\":{\"sourceId\":\"Computer Name\",
\"columnName\":\"Computer Name\"}, \"displayName\":\"Computer Name\", \"display\":{}},
{\"id\":\"2\", \"sourceColumn\":{\"sourceId\":\"IP Address\", \"columnName\":\"IP Address\"},
\"displayName\":\"IP Address\", \"display\":{}}]}, \"summary\":{\"countId\":\"summary_count_
id\", \"displayName\":\"Count\"}}, \"display\":{\"advanced_filters_enabled\":true, \"available_
additional_filters\":[], \"available_quick_filters\":[\"quick:base:computerGroup\",
\"quick:base:endpointLastSeen\", \"quick:base:os\"], \"version\":1}, \"categories\":
[{\"name\":\"Test\"}], \"meta\":{\"class\":\"USER\", \"type\":\"V2\"}}"
    }
  }
}
```

Import report definition

`mutation.reportImport`

IMPORT A REPORT DEFINITION

The following query imports a report definition that you exported using the `reportExport` query.

```
mutation exampleImportReportDefinition($allowDuplicate: Boolean!, $reportDefinition:
String!) {
  reportImport(
    input: {allowDuplicate: $allowDuplicate, reportDefinition: $reportDefinition}
  ) {
    report {
      id
    }
    error {
```

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```
      message
      retryable
      timedOut
    }
  }
}
```

Include the report ID variable in the **Variables** panel or in your variables dictionary.

```
{
  "allowDuplicate": false,
  "reportDefinition": "{\"id\":\"12345678-90ab-cdef-1234-567890abcdef\",
\"displayName\":\"Example report import\", \"description\":\"Example import functionality\",
\"contentSet\":{\"name\":\"Reporting\"}, \"sourceView\":{\"id\":\"source data\", \"querySpec\":
{\"hasChanged\":true, \"sources\":{\"Computer Name\":{\"id\":\"Computer Name\", \"sensor\":
{\"sensorName\":\"Computer Name\", \"flatten\":true}}, \"IP Address\":{\"id\":\"IP Address\",
\"sensor\":{\"sensorName\":\"IP Address\", \"flatten\":false}}}, \"selects\":[{\"id\":\"1\",
\"sourceColumn\":{\"sourceId\":\"Computer Name\", \"columnName\":\"Computer Name\"},
\"displayName\":\"Computer Name\", \"display\":{}}, {\"id\":\"2\", \"sourceColumn\":
{\"sourceId\":\"IP Address\", \"columnName\":\"IP Address\"}, \"displayName\":\"IP Address\",
\"display\":{}}]}, \"summary\":{\"countId\":\"summary_count_id\", \"displayName\":\"Count\"}},
\"display\":{\"advanced_filters_enabled\":true, \"available_additional_filters\":[],
\"available_quick_filters\":[\"quick:base:computerGroup\", \"quick:base:endpointLastSeen\",
\"quick:base:os\"], \"version\":1}, \"categories\":[{\"name\":\"Test\"}], \"meta\":
{\"class\":\"USER\", \"type\":\"V2\"}}"
}
```

Example response:

```
{
  "data": {
    "reportImport": {
      "report": {
        "id": "abcdef12-3456-7890-abcd-ef1234567890"
```

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```
      },
      "error": null
    }
  }
}
```

Get refreshed report result data

`query.reportResultData.collectionInfo.startCursor, query.reportResultData (refresh)`

Stability: 0 - Deprecated

RETRIEVE REPORT RESULTS COLLECTION START CURSOR

IMPORTANT

The cursor refresh functionality (`query.reportResultData.collectionInfo.startCursor, query.reportResultData (refresh)`) is deprecated and no longer functions. If a query request using `query.reportResultData` fails, resubmit the original query request at least 60 seconds after the initial failed response.

The following query retrieves report details. The query requests `collectionInfo.startCursor`, which is populated in the response only if the data is not ready within 30 seconds. Use the `collectionInfo.startCursor` value for refreshing the request.

```
query exampleGetReportResultCursor($id: ID!, $first: Int) {
  reportResultData(id: $id, first: $first) {
    edges {
      node {
        columns {
          values
        }
      }
    }
    collectionInfo {
      active
      startCursor
    }
```

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```
    }
}
```

Include the pagination and report ID variables in the **Variables** panel or in your variables dictionary.

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef",
  "first": 2
}
```

Example response for an ongoing collection with a `startCursor` value, meaning that the data is not yet ready to be returned:

```
{
  "data": {
    "reportResultData": {
      "edges": [],
     "collectionInfo": {
        "active": true,
        "startCursor": "4t2cB0ZGNPqy4J4P7O7opwz/24/5zgPi6OinDAA=:0"
      }
    }
  }
}
```

REFRESH REPORT RESULTS COLLECTION USING STARTING CURSOR

The following query refreshes the collection using the returned `startCursor` value:

```
query exampleRefreshReportResultCursor($id: ID!, $first: Int, $refresh: Cursor) {
  reportResultData(id: $id, first: $first, refresh: $refresh) {
    edges {
      node {
        columns {
          values
```

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```
        }
      }
    }
    collectionInfo {
      active
      startCursor
    }
  }
}
```

Include the pagination and report ID variables in the **Variables** panel or in your variables dictionary:

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef",
  "first": 2,
  "refresh": "4t2cB0ZGNPqy4J4P7O7opwz/24/5zgPi6OinDAA=:0"
}
```

Example response with a completed collection:

```
{
  "data": {
    "reportResultData": {
      "edges": [
        {
          "node": {
            "columns": [
              {
                "values": [
                  "Example computer 1"
                ]
              },
              {
```

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```
                "values": [
                  "2001:DB8::1234",
                  "192.0.2.10"
                ]
              }
            ]
          }
        },
        {
          "node": {
            "columns": [
              {
                "values": [
                  "Example computer 2"
                ]
              },
              {
                "values": [
                  "2001:DB8::1234",
                  "192.0.2.20"
                ]
              }
            ]
          }
        }
      ],
     "collectionInfo": {
        "active": false,
        "startCursor": null
      }
    }
  }
}
```


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