Tanium Automate User Guide

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Automate overview

With Automate, use playbooks to simplify Tanium platform interactions into logical steps to solve key scenarios. Automate offers a mix of full automation and user-driven actions across Tanium solutions to streamline routine business processes for teams and improve productivity. With Automate, you can:

- Create playbooks to run tasks across multiple Tanium solutions.
- Build your own custom playbooks.
- Easily deploy playbooks to run at scale.
- Reuse playbooks for multiple workflow runs.

Note: Automate uses functionality contained in the Tanium™ Core Platform and other Tanium solutions. To use Automate to automate tasks in your environment, you should have a fundamental understanding of the Tanium Core Platform and be familiar with any solutions that you intend to use in your playbooks. For more information about the solutions that Automate supports, see Interoperability with other Tanium products on page 17.

Playbooks

Automate uses *playbooks* to automate workflows. A playbook is a series of sequential *steps* that progress automatically or manually to accomplish a goal. With Automate, you can build custom playbooks to accomplish your goals.

Steps

A step is a single action in a playbook that might be performed automatically or manually. When you create or edit a playbook, you can add, remove, and reorder steps in the playbook.

You must have sufficient permissions to a step to add that step to a playbook. This includes permissions to any solutions or content that are required by the step.

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For more information about available steps and requirements, see Reference: Steps on page 222.

Step targeting

You can add steps to playbooks that target endpoints, such as the **Deploy Action** step. When you add the step, you can select the endpoints for the step to target based on:

- endpoints that were targeted by the previous targeting step,
- endpoints that successfully completed the previous targeting step, or
- select different computer groups to target.

The previous targeting step does not need to immediately precede this step. The options to target endpoints from the previous targeting step are only available if there is a previous targeting step in the playbook.

Targeting scenarios

Consider the following example endpoints, belonging to the following computer groups:

Example of endpoints and computer group membership

Endpoint host name	Computer group membership
`1-WINDOWS-PHYSICAL`	• All Computers • All Windows Workstations • All Physical Machines
`2-WINDOWS-VIRTUAL`	• All Computers • All Windows Workstations • All Virtual Machines
`3-LINUX-PHYSICAL`	• All Computers • All Linux Workstations • All Physical Machines
`4-LINUX-VIRTUAL`	• All Computers • All Linux Workstations

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Endpoint host name	Computer group membership
	• All Virtual Machines
5-MACOS-VIRTUAL	• All Computers • All macOS Workstations • All Virtual Machines

Consider a playbook that has three steps:

1. Deploy Action, targeting members of the **All Computers** computer group (1-WINDOWS-PHYSICAL, 2-WINDOWS-VIRTUAL, 3-LINUX-PHYSICAL, 4-LINUX-VIRTUAL, 5-MACOS-VIRTUAL)
2. Wait, five minute duration
3. Deploy Action, targeting described in the following examples

Step 1 does not have any additional targeting configured.

When the playbook runs, step 1 targets all five endpoints in the **All Computers** computer group. Of the endpoints, 1-WINDOWS-PHYSICAL and 4-LINUX-VIRTUAL successfully complete step 1.

The results of step 1 can then influence which endpoints are targeted by step 3, which is the next targeting step in this scenario. The following table shows the targeting options for step 3 and which endpoints will be targeted.



Note: The following table assumes all targeted endpoints are online for the entire workflow.

Targeting options for step 3

Step 3 Deploy Action targeting	Targeting evaluation
Deploy Action to new target, targeting members of All Windows Workstations computer group, constrained by no additional action group	Target members of All Windows Workstations computer group: • 1-WINDOWS-PHYSICAL • 2-WINDOWS-VIRTUAL

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Step 3 Deploy Action targeting	Targeting evaluation
Deploy Action to new target, targeting members of All Windows Workstations computer group, constrained by All Virtual Workstations action group	Target members of All Windows Workstations computer group and All Virtual Workstations action group: • `2-WINDOWS-VIRTUAL`
Deploy Action to targets from previous step, constrained by no additional action group	Inherit targeting from Step 1 (the most recent prior step in the playbook that targeted endpoints), target members of All Computers computer group: • `1-WINDOWS-PHYSICAL` • `2-WINDOWS-VIRTUAL` • `3-LINUX-PHYSICAL` • `4-LINUX-VIRTUAL` • `5-MACOS-VIRTUAL`
Deploy Action to targets from previous step, constrained by All Virtual Workstations action group	Inherit targeting from Step 1 (the most recent prior step in the playbook that targeted endpoints), target members of All Computers computer group that are also members of All Virtual Workstations action group: • `2-WINDOWS-VIRTUAL` • `4-LINUX-VIRTUAL` • `5-MACOS-VIRTUAL`
Deploy Action to endpoints that completed the previous step successfully, constrained by no additional action group	Inherit targeting from Step 1, target members of All Computers computer group that also completed Step 1 successfully: • `1-WINDOWS-PHYSICAL` • `4-LINUX-VIRTUAL`
Deploy Action to endpoints that completed the previous step successfully, constrained by All Virtual Workstations action group	Inherit targeting from Step 1, target members of All Computers computer group that also completed Step 1 successfully and are members of All Virtual Workstations action group: • `4-LINUX-VIRTUAL`

Synchronous steps

Each step in a playbook that targets endpoints runs synchronously on all targeted endpoints. This

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means that to continue to the next step in a playbook, each targeted endpoint must complete the step, whether successful or not, within an evaluation time period based on the step type. Endpoints that do not respond or are otherwise unavailable during this evaluation time period (such as offline endpoints) complete the step as not successful. A step is considered complete when the evaluation period elapses, and no more endpoints are in a **Pending** state or a timeout occurs.

When a step completes, Automate evaluates the status of all targeted endpoints. If a threshold or conditional check is met, the playbook continues to the next step. Otherwise, the playbook stops. Subsequent steps can continue to target all previously targeted endpoints, target only endpoints that successfully completed the prior step, or provide custom targeting.

Playbook runs

After you create a playbook, you can run the playbook. When you run a playbook, Automate creates an instance of the playbook, otherwise called a *playbook run*. Playbooks are reusable; you can initiate multiple runs from the same playbook, and define different parameter values for each run. You can manually start a playbook run, or you can schedule the playbook run.



Note: If you schedule a playbook with parameters, you configure parameter values when you create the schedule. Every scheduled playbook run uses those defined parameter values.

Playbook run initiator

Any user with sufficient permissions can initiate playbook runs. A user does not need to create a playbook to run a playbook. Playbook runs use the computer management group permissions of the user who initiates the run to determine which endpoints to target. Thus, a playbook can target different endpoints depending on which user and persona starts the playbook run. Multiple users can each create a playbook run based on a playbook revision, and these playbook runs can run concurrently.

Scheduled runs use the computer management group permissions of the user and persona of the playbook schedule creator.

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Important: Automate generates an API token associated with each user and active persona that initiates playbook runs, active for 7 days after creation date, to manage playbook runs. After a token expires, Automate rotates the API token for that user and active persona. These API tokens contain the note "System Use Only for Automate", and are not associated with trusted IP addresses because the API tokens are used for authentication and authorization only within the Tanium Core Platform. Do not delete these API tokens, as playbook runs might fail. If an API token is deleted, start or schedule playbooks that use that API token to generate a new API token associated with your user and active persona.

To initiate a run for a playbook, a user must have the following permissions:

- **Automate Playbook execute** permission on the playbook content set
- Permissions to any solutions used by the steps in the playbook
- Permissions to any content used in the playbook, including content sets, sensors, and computer groups
- Computer management group permissions for endpoints targeted by the playbook

Supported languages

You can select one of the languages in the following table for user interface (UI) text in the Automate 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- <#>

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Language	Locale code	Date and time format
Korean (Korea, Republic of)	ko-KR	yyyy.mm.dd GMT- <#>
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.

Tanium Autonomous IT Platform in Automate

Tanium Autonomous IT Platform comprises a set of interrelated features across multiple Tanium solutions. The Autonomous IT Platform provides guided initial configuration for solutions, proactively collects intelligence about conditions in Tanium environments, provides guidance based on those conditions, and enables automated workflows to address issues. For more information, see Tanium™ Console User Guide: Working with the Tanium Autonomous IT Platform. Tanium Automate provides the following Autonomous IT Platform features:

- **Playbooks**: Playbooks contain a series of steps, each representing a single task, that run Tanium functionality automatically. You can create custom reusable playbooks and run the playbook on an ad-hoc basis or on a schedule. For more information, see Building playbooks on page 37 and Reference: Steps on page 222.

Interoperability with other Tanium products

Connect

The **Run a Tanium Connection** step requires Tanium™ Connect to run a connection. For more information, see Reference: Steps on page 222.

For more information about Connect, see Tanium Connect User Guide.

Deploy

The **Deploy Action** step requires Tanium™ Deploy to deploy a specified package to target endpoints. The **Deploy Software** step requires Deploy to install, update, or remove software packages or bundles on target endpoints. For more information, see Reference: Steps on page 222.

For more information about Deploy, see Tanium Deploy User Guide.

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Email

Use Tanium™ Email to send playbook run email notifications.

For more information about configuring an email server profile, see Tanium Connect User Guide: Configure email server profile settings for Microsoft 365.

Gateway

Use Tanium™ Gateway to access the Automate API. For more information, see Reference: Gateway examples for Automate on page 83.

Patch

The **Install Patch** step requires Tanium™ Patch to deploy software to target endpoints. For more information, see Reference: Steps on page 222.

For more information about Tanium Patch and how to install patches, see Tanium Patch User Guide.

Reporting

You can target the endpoints in a playbook run directly from a report or the **Explore Data** page in Tanium™ Reporting.

For more information, see Tanium Reporting User Guide: Deploy an action or run a playbook.

Threat Response and Quarantine

The **Linux Quarantine** and **Windows Quarantine** steps require Tanium™ Threat Response and Tanium™ IR Quarantine to quarantine endpoints from the network. The **Remove Linux Quarantine** and **Remove Windows Quarantine** steps require Tanium Threat Response and Tanium IR Quarantine to restore network connectivity to quarantined endpoints. For more information, see Reference: Steps on page 222.

For more information about Tanium Threat Response and quarantining endpoints, see Tanium Threat Response User Guide.

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Getting started with Automate

Follow these steps to configure and use Automate.

Step 1: Install and configure Automate

Install and configure Automate. For more information, see Installing Automate on page 32 and Configuring Automate on page 34.

Step 2: Build a playbook

Build your own custom playbook. For more information, see Create a playbook on page 37.

Step 3: Run the playbook

Initiate a playbook run from the playbook that you created. For more information, see Running playbooks on page 49.

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Automate requirements

Review the requirements before you install and use Automate.

Core platform dependencies

Make sure that your environment meets the following requirements:

- Tanium license that includes Automate. For more information about how to get Automate, see Tanium Solutions & Bundles.
- Tanium Core Platform servers
- Tanium™ Client: No client requirements

Solution dependencies

Other Tanium solutions are required for Automate to function (required dependencies) or for specific Automate 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.

Note: Some Automate dependencies have their own dependencies, which you can see in the lists of required and feature-specific dependencies below. Where a dependency links to its own user guide, that link opens the guide for the latest version of the solution, not necessarily the minimum version that Automate requires.

Tanium recommended installation

If you select **Tanium Recommended Installation** when you import Automate, 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.

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Import specific solutions

If you select only Automate 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 Automate, the server automatically updates those dependencies to the latest available versions.

Required dependencies

Automate has the following required dependencies at the specified minimum versions:

- Tanium™ Automation Engine Service
- Tanium™ Gateway
- Tanium™ Interact
- Tanium™ Data Service (TDS)
- Tanium™ RDB Service
- Tanium™ Secrets Service

Feature-specific dependencies

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

- Tanium™ Automate Content is required to view Tanium-managed content related to Automate, such as deployment plans
- Tanium™ Connect is required to configure an email server profile
- Tanium™ Email Service is required to send playbook run event notifications using email
- Tanium™ Threat Response is required to include **Linux Quarantine**, **Windows Quarantine**, **Remove Linux Quarantine**, and **Remove Windows Quarantine** steps in playbooks
- Tanium™ Patch is required to include **Install Patch** steps in playbooks

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Tanium™ Module Server

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

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

Endpoints

Automate does not directly deploy packages to endpoints. However, Automate can use Tanium solutions that do deploy packages to endpoints. Be sure to review the requirements for any solutions that Automate uses in your environment. For more information, see Solution dependencies on page 20.

For more information about 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 Automate.

Ports

The following ports are required for Automate communication.



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.

PORTS FOR AUTOMATE COMMUNICATION

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Port requirements

Source	Destination	Port	Protocol	Purpose
Module Server	Module Server (loopback)	17620	TCP	Internal purposes, not externally accessible
		17621	TCP	Internal purposes, not externally accessible
		17622	TCP	Internal purposes, not externally accessible
		17623	TCP	Internal purposes, not externally accessible
		17624	TCP	Internal purposes, not externally accessible
		17625	TCP	Internal purposes, not externally accessible
		17631	TCP	Internal purposes, not externally accessible
		17632	TCP	Internal purposes, not externally accessible
		17633	TCP	Internal purposes, not externally accessible
		17634	TCP	Internal purposes, not externally accessible
		17635	TCP	Internal purposes, not externally accessible
		17640	TCP	Internal purposes, not externally accessible

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 Reference: Endpoint security exclusions. For Windows-based Tanium Core Platform deployments, see Tanium Core Platform Server security exclusions.

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

AUTOMATE SERVER EXCLUSIONS

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

Target Device	Notes	Exclusion Type	Exclusion
Module Server		Process	*<Module Server>* \services\automate-service\TaniumAutomateService.exe
		Process	*<Module Server>* \services\automation-service\ TaniumAutomationService.exe

User role requirements

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

- solution permissions on page 25
- administration and platform content permissions on page 26: The solution permissions automatically provide some of these permissions.

To review a summary of the predefined roles, see Set up Automate users on page 35.

Optional roles for on page 27 are required to enable optional Automate functionality.

Table 9. Permissions for playbook steps on page 27 lists the permissions required to add each playbook step.

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

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sections of the Tanium Console User Guide:

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

> **Note:** Do not assign the **Automate Service Account** or **Automation Service Account** roles to users. These roles are for internal purposes only.

Automate solution permissions

Permission	Automate Playbook Editor [1]	Automate Playbook Runner [1]	Automate Playbook Viewer [1]	Deployment Plan Editor [1]	Deployment Plan User [1]
Automate View the Automate workbench	✓ SHOW	✓ SHOW	✓ SHOW	✓ SHOW	✓ SHOW
Automate Playbook View, edit, and run playbooks	✓ READ WRITE	✓ READ EXECUTE	✓ READ	✗	✗
Automate Service Account Provides permissions for the Automate service account. For internal purposes only.	✗	✗	✗	✗	✗
Deployment Plan EDITOR: Create, update, and delete deployment plans, and assign deployment plans to actions. USER: Assign deployment plans to actions	✗	✗	✗	✓ EDITOR	✓ USER

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

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Automate administration and platform content permissions

Permission	Permission Type	Automate Playbook Editor	Automate Playbook Runner	Automate Playbook Viewer	Deployment Plan Editor	Deployment Plan User
Action Group	Administration	READ	READ	READ		
Token - Use	Administration	SPECIAL	SPECIAL	SPECIAL	SPECIAL	SPECIAL
Deployment Plan	Platform Content				READ WRITE	READ
Filter Group	Platform Content	READ	READ	READ	READ	READ
Plugin	Platform Content	READ EXECUTE	READ EXECUTE	READ EXECUTE	READ EXECUTE	READ EXECUTE
Progression Criteria Set	Platform Content				READ WRITE	READ
Ring Set	Platform Content				READ WRITE	READ
Sensor	Platform Content	READ	READ	READ	READ	READ

To view the content sets to which the platform content permissions apply, see View effective role permissions .

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Optional roles for Automate

Role	Enables
Connect Operator	Configure email server profiles and allow sending emails using an email server profile

Permissions for playbook steps

Step	Required permissions
Add Custom Tag (Non-Windows) on page 222	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Add Custom Tag (Windows) on page 226	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Communicate with an API on page 230	No additional permissions are required to add this step.
Deploy Action on page 231	• **Interact Execute action** permission • **Package read** permission on content sets determine which packages are available for selection in actions • **Action write** permission on the content sets of packages enables you to deploy actions that use those packages • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Deploy Software on page 235	• **Deploy show** permission to view the Deploy Software step • **Deploy Settings read** permission to retrieve Deploy settings • **Deploy Software Package read** permission to view software packages • **Deploy Software Package Bundle read** permission to view software package bundles

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Step	Required permissions
	• **Deploy Deployment write** permission on content sets to create deployments, create deployment templates, and perform operations such as stopping and cloning deployments • **Deploy Software Package execute** permission on content sets to execute software packages • **Deploy Software Package Bundle execute** permission on content sets to execute software bundles
Endpoint Sequence on page 239	• **Interact Execute action** permission • **Package read** permission on content sets determine which packages are available for selection in actions • **Action write** permission on the content sets of packages enables you to deploy actions that use those packages • **Action write** permission on the Automate content set enables you to use the actions that trigger the endpoint sequence. This permission is included in the **Playbook write** permission. • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Install Patch on page 245	• **Computer Group read** permission • **Patch Deployment execute** permission • **Patch Deployment write** permission • **Sensor read** permission
Manual Instruction on page 250	No additional permissions are required to add this step. The Tanium operator completing the step needs the **Automate Playbook execute** permission.
Reboot Non-Windows Machine on page 251	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Reboot Windows Machine on page 255	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow.

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Step	Required permissions
	Therefore, these permissions are required to complete the action deployment workflow.
Remove Custom Tag (Non-Windows) on page 259	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Remove Custom Tag (Windows) on page 263	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Require User Confirmation on page 267	No additional permissions are required to add this step. The Tanium operator completing the step needs the **Automate Playbook execute** permission.
Restart Service (Non-Windows) on page 268	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Restart Service (Windows) on page 272	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Ring Deployment on page 276	• **Deployment Plan User** or **Deployment Plan Editor** role
Run a Tanium	• **Connect read** permission to view available connections

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Step	Required permissions
Connection on page 277	• **Connect run** permission to run connections
Set Service Start Mode (Windows) on page 279	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Start Service (Non-Windows) on page 283	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Start Service (Windows) on page 287	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Stop Service (Non-Windows) on page 291	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Stop Service (Windows) on page 295	• **Interact Execute action** permission • **Package read** and **Action write** permissions are required on the **Core Content** content set • **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.
Verify Condition on	No additional permissions are required to add this step.

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Step	Required permissions
page 299	
Wait on page 300	No additional permissions are required to add this step.

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Installing Automate

About this task

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

- Automatic configuration with default settings: Automate is installed with any required dependencies and other selected products. After installation, the Tanium Server automatically configures the recommended default settings. This option is the best practice for most deployments. For more information about the automatic configuration for Automate, see Import Automate with default settings on page 32.
- Manual configuration with custom settings: After installing Automate, you must manually configure required settings. Select this option only if Automate requires settings that differ from the recommended default settings. For more information, see Import Automate with custom settings on page 33.

Before you begin

- Review the Automate requirements on page 20.
- Assign the correct roles to users for Automate. Review the User role requirements on page 24.
    - To import the Automate solution, you must be assigned the Administrator reserved role.

Import Automate with default settings

About this task

No default settings are configured for Automate.

To import Automate and configure default settings, see Tanium Console User Guide: Import all modules and services. After the import, verify that the correct version is installed: see Verify Automate version on page 33.

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Import Automate with custom settings

About this task

To import Automate without automatically configuring default settings, be sure to clear the **Apply All Tanium recommended configurations** checkbox while performing the steps in Tanium Console User Guide: Import or update specific solutions. After the import, verify that the correct version is installed. For more information, see Verify Automate version on page 33.

Manage solution dependencies

Other Tanium solutions are required for Automate to function (required dependencies) or for specific Automate features to work (feature-specific dependencies).

Verify Automate version

1. Refresh your browser.
2. From the Main menu, go to **Automate** > **Overview**.
3. To display version information, click Info .

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Configuring Automate

Configure email server profile to send emails

If you want to send playbook run emails, configure an email server profile in the Connect settings. Automate emails require email server profile for delivery.

Note the following:

- Automate emails require Tanium Email 1.2.91 or later, a configured email server, and the **Automate Playbook write** and **Email send** permissions, to create or update a playbook that can send email notifications. To receive email notifications, ensure that the **From User** email address and the email server are added to your network allow list, and that no local user email access rules block emails from the **From User** email address.

  > **Note:** You must configure at least one email server profile in the Tanium Connect settings to submit a request to send email. Configuring an email server profile requires Connect 5.16.180 or later and the **Email Config** write permission. For more information, see Tanium Connect User Guide: Configure email server profile settings for Microsoft 365.

- To start a playbook run that sends email notifications, the Tanium operator must have the **Email send** permission and access to an email server profile. If the Tanium operator has permission to more than one email server profile, Automate selects one to send emails.

  > **Note:** The **Automate Playbook execute** permission automatically provides the **Email send** permission on the Connect content set. This content set contains new email server profiles by default.

For more information about configuring playbook run notifications, see Configure playbook run notifications on page 39.

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Set up Automate users

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

For more information about permissions for each role, see User role requirements on page 24.

Important: On installation, Automate creates a Automate user to automatically manage the Automate service account. Do not edit or delete the Automate user.

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

Tip: To provide just-in-time access or scalable standing access to Automate functionality, you can use SCIM provisioning combined with Tanium user groups. This approach lets you manage user access at scale or ad hoc through your identity provider, without creating users individually in Tanium. For more information, see Provision users into Tanium user groups with SCIM.

Automate Playbook Editor

Assign the **Automate Playbook Editor** role to users who create and manage playbooks.

Automate Playbook Runner

Assign the **Automate Playbook Runner** role to users who run playbooks.

Automate Playbook Viewer

Assign the **Automate Playbook Viewer** role to users who need visibility into Automate playbooks.

Deployment Plan Editor

Assign the **Deployment Plan Editor** role to users who create and manage deployment plans, and assign deployment plans to actions.

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Deployment Plan User

Assign the **Deployment Plan User** role to users who assign deployment plans to actions.

> **Note:** Do not assign the **Automate Service Account** or **Automation Service Account** roles to users. These roles are for internal purposes only.

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Building playbooks

Automate provides an intuitive, no-coding playbook builder that simplifies Tanium platform interactions into logical and repeatable action to solve your key scenarios. Playbooks offer a mix of full automation and user-driven actions across Tanium solutions to streamline routine business processes for teams and to improve productivity.

> **Important:** For the best results, do not configure a playbook that might take more than 90 days to complete. Playbook runs have a maximum lifetime of 90 days, after which the playbook run immediately ends. In-flight actions that started because of the playbook run, such as deploying a Tanium package to endpoints, complete as expected, but in-flight functionality specific to a playbook run, such as a **Manual Instruction** step, does not complete.

Create a playbook

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** section, click **Create Playbook**.
   The **Create Playbook** page opens.
3. Enter a name and optional description for the playbook. The playbook name does not need to be unique.
4. Select a Content Set to which this playbook belongs.
5. (Optional) Configure playbook run notifications. For more information, see Configure playbook run notifications on page 39.
6. Add steps.
   a. Click **Add Step**.
   b. Click + next to the step that you want to add.
   c. Enter all information for the step. For more information, see Reference: Steps on page 222.
   d. Configure field parameters. For more information, see Configure playbook field parameters on page 41.
   e. Click **Apply** when finished with the step, or click **Apply and Add Step** to add the step

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and configure another step.

7. (Optional) Update added steps. You have the following options:
   - To reorder a step, click  and drag the step in the order that you prefer.
   - To clone an existing step, click Clone Step . The cloned step has `- Clone` suffixed to the name.
   - To delete a step, click Delete .
   - To add a step after an existing step, click Add  next to the existing step.
8. When finished, click **Save**.

Result

Automate saves the playbook and opens the Playbook Details page.

Edit a playbook

About this task

When you edit and save a playbook, any changes that you make are applied to future runs of the playbook. Playbook runs that are in progress are not affected by edits to the playbook. However, saving any playbook updates also disables all associated playbook schedules created by other users, because updates might affect how a playbook run affects an endpoint.

You can only edit a playbook if you have access to the content set to which the playbook is assigned. If you want to edit a playbook that is assigned to a content set you cannot access, you can either update the playbook content set to a content set you can access, or you can clone the playbook and edit the cloned version, reassigning it to a content set you can access. For more information, see Clone a playbook on page 42.



Note: To schedule runs, you must have the **Automate Playbook execute** permission on the playbook content set. If you assign a playbook to a different content set and a user does not have access to that content set, any scheduled runs associated with that user are disabled.

1. From the Main menu, go to **Automate** > **Overview**.
   The **Automate Overview** page appears with the **Playbooks** tab open in the **Playbooks**

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section.

2. Click a **Playbook Name** to open that playbook, and then click **Edit**.
   The **Edit Playbook** page appears.
3. (Optional) Edit the name or description. The playbook name does not need to be unique.
4. (Optional) Edit the Content Set to which this playbook belongs.
5. (Optional) Configure playbook run notifications. For more information, see Configure playbook run notifications on page 39.
6. (Optional) Add steps.
   a. Click **Add Step**.
   b. Click + next to the step that you want to add.
   c. Enter all information for the step. For more information, see Reference: Steps on page 222.
   d. Configure field parameters. For more information, see Configure playbook field parameters on page 41.
   e. Click **Apply** when finished with the step, or click **Apply and Add Step** to add the step and configure another step.
7. (Optional) Update added steps. You have the following options:
   - To reorder a step, click ⠿ and drag the step in the order that you prefer.
   - To clone an existing step, click Clone Step. The cloned step has `- Clone` suffixed to the name.
   - To delete a step, click Delete.
   - To add a step after an existing step, click Add + next to the existing step.
8. (Optional) To edit existing steps, select a step, and then update the field values.
9. When finished, click **Save**.

Result

Automate saves the playbook and opens the Playbook Details page.

Configure playbook run notifications

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Automate can send playbook run event notifications as emails to configured recipient email addresses. You can configure notifications for the following playbook run event types:

- **Run starts** - A Tanium operator manually starts a playbook run or a scheduled playbook automatically starts a playbook run
- **Run completes** - A playbook run completes
- **Run stops prior to completion** - A playbook run stops before completion
- **Run has errors** - A playbook run generated an error
- **Step requires user confirmation to continue** - More than 10 minutes elapsed since a step that requires manual Tanium operator intervention started, such as the **Manual Instruction** step or **Requires User Confirmation** step

Email notifications are sent by the **From User** email address configured in the email server profile. The subject starts with `Tanium Playbook` and contains the selected playbook run event type and related information. The email body contains playbook run and event information.

> **Note:** All configured email addresses receive one email notification per event. Do not add an email address to the recipient list multiple times.

Before you begin

- Automate emails require Tanium Email 1.2.91 or later, a configured email server, and the **Automate Playbook write** and **Email send** permissions, to create or update a playbook that can send email notifications. To receive email notifications, ensure that the **From User** email address and the email server are added to your network allow list, and that no local user email access rules block emails from the **From User** email address.

  > **Note:** You must configure at least one email server profile in the Tanium Connect settings to submit a request to send email. Configuring an email server profile requires Connect 5.16.180 or later and the **Email Config** write permission. For more information, see Tanium Connect User Guide: Configure email server profile settings for Microsoft 365.

- To start a playbook run that sends email notifications, the Tanium operator must have the

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Email send permission and access to an email server profile. If the Tanium operator has permission to more than one email server profile, Automate selects one to send emails.

> **Note:** The **Automate Playbook execute** permission automatically provides the **Email send** permission on the Connect content set. This content set contains new email server profiles by default.

Configure notifications from a playbook

1. From the **Create Playbook** or **Edit Playbook** page, expand the **Notifications** section.
2. Select one or more event types to send a notification by email.
3. If you selected an email notification, enter **Recipients** email addresses, either separated with a comma (`,`) or each on a new line.
4. Click **Save**.

Configure playbook field parameters

About this task

You can create playbooks with step field parameters. When you manually start a playbook run, you can assign field parameter values for that playbook run, and reuse a playbook for various scenarios that might require different field values or endpoint targeting. You must define a default parameter value. If the Tanium operator that starts a playbook run does not change a parameter value, the playbook run uses that default value. If you schedule playbook runs, you define the parameter values when creating the schedule, and each scheduled run uses the same parameter values.

Only certain fields support parameter substitution when you manually start a playbook run. Some fields might depend on a separate field value to be defined before determining valid values for the dependent field. For example, an **Install Patch** step requires selecting the targeted endpoint **Platform** before the **Content to Deploy** fields populate with values relevant to the selected operating system. Other fields might not support parameters, and require that the field value defined during playbook creation is used for every playbook run. For example, the step **Name** generally does not support parameters, and each step name remains the same for every playbook run.

Fields that support parameters display a **Add Parameter** checkbox. Fields that do not support

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parameters do not display a **Add Parameter** checkbox, and use the defined playbook value. When users run the playbook, they can review and update the parameter values. Parameterized fields show the **Parameter** pill.

You can define zero, one, or multiple field parameters for a playbook. The parameter value data type must match the field data type. For example, you cannot assign a string parameter value to a number data type field.

1. From the **Create Playbook** or **Edit Playbook** page, select **Add Parameter** for the step field.
2. Optionally, enter a parameter description.
3. Enter a parameter value.

Clone a playbook

About this task

To clone a playbook, you must have the **Automate Playbook write** permission on the playbook content set.

Note: When you clone a playbook, you can edit the new playbook before you save the playbook. Playbook schedules are not cloned when you clone a playbook.

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, find the row for the playbook, click Actions and then select **Clone**.
3. Provide a name and optional description for the new playbook.
4. Edit any settings or steps and then click **Create**.
   For more information about the fields and steps that you can edit, see Create a playbook on page 37.

Export and import playbooks

You can export one or more playbooks to a JSON file. The playbook configuration includes configured steps and playbook metadata, such as name and description. The playbook configuration does not include associated playbook schedules. You can edit the JSON file offline and then import

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the file back into Automate.

Note: You can export only the most recent version of a playbook. If you export a playbook, the JSON file does not include schedule configuration, the playbook author, associated playbook runs, or indirectly associated content, such as packages or sensors referenced in a step.

Export a playbook

About this task

- From a playbook detail view, select **Actions** > **Export**.

The JSON file downloads to the browser's download folder.

Export multiple playbooks in one file

About this task

You can export up to 500 playbooks in a single JSON file.

1. From the Automate menu, go to **Overview**.
2. In the **Playbooks** tab, select one or more playbooks that you want to export.
3. Click **Export**.

Result

The JSON file downloads to the browser's download folder.

Import a playbook JSON file

About this task

If you import a JSON file containing playbook configuration, each playbook is created as a new playbook, and does not overwrite existing playbooks, even if the playbooks have the same name. The importing user and active persona are set as the author of each imported playbook, instead of the original exported playbook author.

Multiple playbooks in a JSON file import one at a time. If one playbook fails to import, the import

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process continues for remaining playbooks. After the import completes, verify the configuration for any playbooks that failed to import, export these playbooks in a new JSON file, then import that file.

> **Note:** Ensure that the Tanium environment contains all necessary dependencies, including solution dependencies for configured steps, actions and packages referenced by steps, or other Tanium configurations. Otherwise, playbook runs initiated from this playbook might return an error or fail to complete.

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, click **Import**.
3. From the **Import Playbooks** dialog, either drag the JSON file into the drop area, or click **Browse for File** to select the JSON file that you want to import.
4. Select the playbooks to import.
5. Click **Import**.

Delete a playbook

About this task

You can only delete a playbook if you have access to the content set associated with a playbook.

- If you delete a playbook with scheduled runs, future runs are canceled.
- If you delete a playbook with an active run, the run continues to completion. If needed, you can manually stop an active run; see Stop playbook run on page 63.

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, find the row for the playbook, click Actions and then select **Delete**.
3. Click **Delete** to confirm that you want to delete the playbook.

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Managing API and authentication configurations

Manage the API configurations and authentication configurations that playbooks use to communicate with external APIs. An API configuration defines the request that Automate sends (host, path, method, body, and headers), and can reference an authentication configuration that defines how Automate authenticates to the host.

> **Note:** To create, edit, test, or delete API configurations, you must have the **Automate Playbook write** permission. To create, edit, or delete authentication configurations, you must have the **Automate API Authentication write** permission.

Create an API configuration

About this task

An API configuration defines the request that a playbook step sends to an external API. If the API requires authentication, you can associate an authentication configuration with the API configuration.

1. From the Main menu, go to **Automate** > **API Configurations**.
2. Click **Create**.
3. In the **Name** field, enter a name.
4. (Optional) In the **Description** field, enter a description.
5. In the **Host** field, enter the host name of the API endpoint.

   > **Important:** You cannot change the host after you create the API configuration.

6. (Optional) From the **Authentication Configuration** dropdown, select an authentication configuration. Only authentication configurations whose host exactly matches the **Host** value appear in the list. If you want to create one now, click **Create New Configuration**. For more

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information, see Create an authentication configuration on page 46.

7. (Optional) In the **Path** field, enter the path to append to the host, such as `/v1/resources/{{resource_id}}`. Enter a variable as `{{variable_name}}`.
8. For **Method**, select **POST** or **PUT**.
9. (Optional) In the **Body** field, enter the request body. Enter variables the same way as in **Path**.
10. (Optional) Click **Add Header** to add a request header. Enter a **Header** name and **Value**. Enter variables the same way as in **Path**.
11. (Optional) If the path, body, or headers contain variables, enter a **Display Name** and **Description** for each variable that appears in the **Variables** table.
12. (Optional) Click **Test API Connection** to send a test request using the values that you enter in the **Value to Test API Connection** column.
13. Click **Create**.

Create an authentication configuration

About this task

An authentication configuration stores the credentials that Automate uses to authenticate with an external API host. Create an authentication configuration if the API that you want to communicate with requires authentication.

1. From the Main menu, go to **Automate** > **API Configurations**.
2. Click the **Authentication Configurations** tab.
3. Click **Create**.
4. In the **Authentication Configuration Name** field, enter a unique name.
5. From the **Authentication Method** dropdown, select **Basic**, **Header**, or **OAuth 2.0**.
6. In the **Host** field, enter the host name of the API endpoint, such as `api.example.com` or `api.example.com:8443`.

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> **Important:** Host must exactly match the host of the API configuration that you want to associate with this authentication configuration. You cannot change the host after you create the authentication configuration.

7. Depending on the authentication method that you selected, enter the following:
   - **Basic**: **Username** and **Password**.
   - **Header**: **Header Name** and **Header Secret**.
   - **OAuth 2.0**: **OAuth 2.0 Token Endpoint URL**, **OAuth 2.0 Client ID**, and **OAuth 2.0 Secret**. **OAuth 2.0 Scope** (Optional) is required by some providers for client credentials grants.
8. From the **Content Set** dropdown, select the content set to which this authentication configuration belongs.
9. Click **Create**.

Update playbooks that use an outdated API configuration

About this task

Playbook steps store their own copy of the values in an API configuration. Edits to an API configuration do not automatically update playbook steps that already use it. **Apply Latest Configuration** updates only the playbooks that you select in the table.

> **Important:** Schedules and triggers that you did not create are disabled after the update.

1. From the Main menu, go to **Automate** > **API Configurations**.
2. Click the name of the API configuration.
3. In the **Used in Playbooks** section, select one or more playbooks that show **No** in the **Latest Configuration** column to update with the latest configuration.
4. Click **Apply Latest Configuration**.
5. Click **Apply** to confirm.

Delete an API configuration

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About this task

Delete an API configuration when you no longer need it.

CAUTION: You cannot undo the deletion of an API configuration, and deletion is not blocked even if playbooks use it. Playbook steps that reference a deleted API configuration fail when the playbook runs, including scheduled or triggered runs. Before you delete an API configuration, check the **Used in Playbooks** section on the configuration detail page.

1. From the Main menu, go to **Automate** > **API Configurations**.
2. Find the row for the API configuration, and then click Delete .

Delete an authentication configuration

About this task

Delete an authentication configuration when you no longer need the stored credentials.

Note: If any API configuration references the authentication configuration, deleting it clears the authentication reference on those API configurations. Playbook steps that use those API configurations fail until you select a different authentication configuration.

1. From the Main menu, go to **Automate** > **API Configurations**.
2. Click the **Authentication Configurations** tab.
3. Find the row for the authentication configuration, and then click Delete .

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Running playbooks

Learn about the requirements to run playbooks and the methods to initiate playbook runs.

Note: Automate supports up to 1000 concurrent in-progress playbook runs. If this maximum is reached, additional scheduled or ad-hoc playbook runs do not start immediately, and are instead added to a first in, first out (FIFO) queue. The queued playbook runs start only after the number of concurrent in-progress playbook runs falls below the maximum. Overall Automate performance might be negatively impacted if more complex playbook runs, which consume more resources than simpler playbook runs, are in progress. More complex playbooks, for example, might have a large number of steps, or target a large number of endpoints to deploy packages. In addition, if a playbook is scheduled to run frequently, this might consume more resources than a playbook scheduled to run on an infrequent basis. Periodically review playbook schedules and in-progress playbook runs to help ensure reasonable resource use.

Important: For the best results, do not configure a playbook that might take more than 90 days to complete. Playbook runs have a maximum lifetime of 90 days, after which the playbook run immediately ends. In-flight actions that started because of the playbook run, such as deploying a Tanium package to endpoints, complete as expected, but in-flight functionality specific to a playbook run, such as a **Manual Instruction** step, does not complete.

Before you begin

- You must have the **Automate Playbook execute** permission on the playbook content set to initiate playbook runs.
- Manually-started playbook runs use the computer management group permissions of the user and persona who initiates the playbook run. Scheduled playbook runs use the computer management group permissions of the user and persona who created the playbook schedule. Playbook runs started or scheduled by different users and personas might target different sets of endpoints due to permission differences.
- Users must have content set and solution permissions to access all content and solutions

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used in the playbook to run the playbook, and content set permission to the content set to which a playbook is assigned. A playbook might define content as a default parameter value, such as a package. Users that do not have permission to access the default content must assign content to which they have permission to access before starting the playbook run.

- You cannot change playbook step variable values if you restart or resume a playbook run. Variable values apply to the entirety of a playbook run. Instead, start a new playbook run to define different variable values.
- Multiple users can initiate playbook runs from the same version of a playbook. Playbook runs initiated by multiple users can run concurrently.
- A user can have multiple concurrent runs for a playbook if they are started manually rather than by schedule.
- Each user can create multiple schedules per playbook. One playbook can be associated with multiple schedules created by multiple users.
- If a playbook author user account is disabled or locked, playbook runs fail. Either enable or unlock the user account, or clone the playbook to a different active user account.
- If action approval is enabled, note the following:
    - Automate will not deploy any action requiring approval until it is approved. Depending on the playbook configuration, the playbook will then either continue to the next step or fail.
    - Automate waits up to 30 days for approval. If the action is not approved and the **Condition to Start Next Step** criteria is set to anything other than **None**, the playbook run fails. But if the condition is set to **None**, the run continues.
    - Actions that require approval show as **Requires Action Approval** in the playbook run history and as **Waiting for action approval** in the ring status.

  For more information about action approval, see Tanium Console User Guide: Managing action approval.

Manually run playbook

About this task

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Perform the following steps to manually start a playbook run.

Any user with the **Automate Playbook execute** permission on the playbook content set and permissions to all content and solutions used in the playbook can manually run the playbook.

1. From the Main menu, go to **Automate** > **Overview**.
   Step result: The **Automate Overview** page appears with the **Playbooks** tab open in the **Playbooks** section.
2. Click a **Playbook Name** to open the playbook.
3. Click **Start**.

   > **Note:** The **Start** button is disabled if you do not have permission to run the playbook, or if there is another run of the same playbook instance that is already active.

4. If the playbook has parameters, the **Review Playbook Parameters** page appears, and you can review the parameter values. You can also perform the following actions:
   - To update a value, click Review Parameters. In the **Review Parameters** dialog, edit the value, and then click **Apply**.
   - To revert updated parameter values to their defaults, click **Restore Default Values**.
5. Click **Start Playbook**.
6. If the playbook contains any manual steps, such as **Manual Instruction** and **Require User Confirmation** steps, a Tanium user must perform those steps when the playbook reaches the steps.
   a. From the Main menu, go to **Automate** > **Overview**. Go to the **Playbook Runs** tab in the **Playbooks** section.
   b. Click a **Playbook Name** to open the playbook run.
   c. Expand the manual step or click **Expand All** to expand all steps in the playbook run.
   d. Follow any included instructions and add any comments.
   e. Complete the manual step.
      - For **Manual Instruction** steps, click **Mark Complete**.
      - For **Require User Confirmation** steps, click **Continue**.

Schedule playbook runs

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You can schedule playbooks to run automatically on a recurring schedule or as a single run. This can be done by creating a schedule on an existing playbook. Playbook runs automatically start for each associated schedule at the configured time. Scheduled playbook runs use the permissions of the user and persona that created the schedule. If you schedule a playbook with parameters, you enter variable values when you create the schedule. Every scheduled playbook run uses those defined variable values.

Each user and persona can create multiple schedules per playbook, but can only have one active playbook run per playbook version. If a user and persona have an active playbook run for a playbook version, and a schedule created by that user and persona would start another playbook run for that playbook version, the scheduled playbook run does not start, and the playbook attempts to start another playbook run on the next scheduled occurrence.



Note: To schedule runs, you must have the **Automate Playbook execute** permission and access to the playbook content set. To disable or delete schedules created by other users, you must have the **Automate Playbook write** permission and access to the playbook content set. You cannot edit playbook schedules created by other users. If you do not have permission, related schedule options are hidden or disabled.

Note the following:

- If you update, disable, or delete a playbook schedule, any in-progress playbook run started on that schedule continues to run.
- If a playbook contains at least one step field parameter, when you create a playbook schedule, you define the parameter values that each scheduled run uses.
- Saving any playbook updates also disables all associated playbook schedules created by other users, because updates might affect how a playbook run affects an endpoint. Schedules that you created for this playbook remain enabled. All in-progress playbook runs associated with this playbook continue to run, including those started by another user's schedule.
- If a playbook step requires sensors and any are missing, such as if one was deleted, the scheduled playbook run will fail.
- If three consecutive scheduled playbook runs for the same playbook version fail, the schedule automatically disables. Updating a playbook creates a new playbook version and

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resets the failed playbook run count.

- Because each playbook might contain multiple schedules, verify that scheduled playbook run start times do not overlap, to reduce resource use and prevent unnecessary playbook runs.
- If you clone a playbook schedule, update the cloned schedule to avoid overlap in playbook run start times, especially if both the original and cloned schedule use the same user and persona permissions.
- When a playbook scheduled for a single run passes the scheduled start time, Automate removes the single run schedule from the Schedules list and adds a run in the playbook run history.
- If a playbook scheduled for a single run is edited or cloned, it defaults to **Enabled**.
- If you schedule a playbook run far ahead in time, ensure the start date falls within a practical timeframe that supports operational needs. Start dates beyond the year 2100 are not supported.
- If a step with parameter overrides uses a package that is out of sync with its source, a warning banner appears when you review parameter values for the schedule. If the source package still exists, you can view the current version of the package or update to it directly from there, without opening the playbook to edit it. If the source package is deleted, select a different package for the step. If you update the package for this schedule, the change affects only this schedule. It does not change the package that the playbook or other schedules and triggers use.

Important: Schedule times are shown in Coordinated Universal Time (UTC). All other times are shown in the user's browser (local) time zone.

Create a playbook schedule

About this task

To set a schedule on an existing playbook:

1. From the Main menu, go to **Automate** > **Overview**.

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2. In the **Playbooks** tab, select a playbook, click **Actions**, and then select **Schedule**.
3. Select a schedule type and configure a schedule.
    - Select **Basic** to use the provided controls to set the schedule.

      The following frequency options are available:

        - One run per day, every day
        - One run per day, on selected days of the week
        - One run per day, on selected days of the month
        - Multiple runs per day, every day
        - Multiple runs per hour, every day
        - Multiple runs per day, on selected days of the week
        - Multiple runs per day, on selected days of the month
        - Single run
        - One run per month, relative to specified day

    - Select **Cron Expression** and use the **Advanced** field to enter the schedule as a cron expression. For information about cron syntax, see Reference: Cron syntax for Automate on page 81.

    A preview of your schedule and the next five upcoming instances is shown.
4. If the playbook contains parameters, define parameter values for each scheduled playbook run to use.
5. When finished, click **Add**.

Edit or clone a playbook schedule

About this task

To edit or clone an existing schedule:

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1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, select a playbook.
3. Click the Schedules tab.
4. You have the following options:
   - Click Actions , then click **Edit** to edit the schedule.
   - Click Actions , then click **Clone** to create a clone of the schedule.
5. Select a schedule type and configure a schedule.
   - Select **Basic** to use the provided controls to set the schedule.

     The following frequency options are available:

     - One run per day, every day
     - One run per day, on selected days of the week
     - One run per day, on selected days of the month
     - Multiple runs per day, every day
     - Multiple runs per hour, every day
     - Multiple runs per day, on selected days of the week
     - Multiple runs per day, on selected days of the month
     - Single run
     - One run per month, relative to specified day
   - Select **Cron Expression** and use the **Advanced** field to enter the schedule as a cron expression. For information about cron syntax, see Reference: Cron syntax for Automate on page 81.

   A preview of your schedule and the next five upcoming instances is shown.
6. When finished, click **Save**.

Disable or delete a playbook schedule

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1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, select a playbook.
3. Click the Schedules tab.
4. You have the following options:
    - Click Actions , then click **Disable** to disable the schedule.
    - Click Actions , then click **Delete** to delete the schedule.

Enable a disabled playbook schedule

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, select a playbook.
3. Click the Schedules tab.
4. For a disabled schedule, click Actions then click **Enable**.

Trigger playbook runs

You can create playbook triggers to automatically respond to endpoint conditions, reducing the need for manual monitoring or short-interval scheduled playbook runs. Automate monitors your endpoints and automatically starts a playbook run when the trigger conditions are met. For example, you might create a trigger that starts a playbook run when any endpoints in your target set report application crashes within the past 24 hours.

Note: To configure triggers, you must have the **Automate Playbook execute** permission on the playbook content set.

Note the following:

- Triggered playbook runs use the computer management group permissions of the user and persona who created the trigger.
- Triggered playbook runs start immediately when any endpoints meet the conditions. Automate does not wait for all potential matches.

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- Automate pauses monitoring while a triggered playbook run is in progress, so no additional runs start until the current one finishes.
- Endpoints that come online or meet criteria while the triggered playbook is in progress might be missed until the next monitoring cycle.
- Editing a playbook automatically disables triggers created by other users and personas, while triggers created by the current user and persona remain enabled.
- Only the user and persona who created the trigger can edit, enable, or disable it.
- If a playbook contains at least one step field parameter, when you configure a playbook trigger, you define the parameter values that each triggered playbook run uses.
- If a playbook step requires sensors and any are missing, such as if one was deleted, the triggered playbook run will fail.
- Automate automatically disables a trigger for any of the following reasons:
    - Three consecutive triggered playbook runs for the same trigger fail.
    - Another user edits the playbook.
    - The API token associated with the user and active persona who created the trigger expires.
    - Playbook parameters are edited and require review. To re-enable, edit the trigger to confirm the updated parameter values and then save.
- If a step with parameter overrides uses a package that is out of sync with its source, a warning banner appears when you review parameter values for the trigger. If the source package still exists, you can view the current version of the package or update to it directly from there, without opening the playbook to edit it. If the source package is deleted, select a different package for the step. If you update the package for this trigger, the change affects only this trigger. It does not change the package that the playbook or other schedules and triggers use.

Create a playbook trigger

About this task

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Create a playbook trigger and specify the endpoints and conditions that must be met for Automate to automatically start a playbook run.

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, select a playbook, click **Actions**, and then select **Create Trigger**.
3. In the **Target Endpoints** section, add targeting criteria for endpoints.
    - **Computer Groups** provides a list of computer groups. Each group defines a set of endpoints that you want to manage as a group.
    - **Question Criteria** filters on all endpoints with a specific set of criteria. For example, you can type `Operating System contains win` in the **Filter Bar** or use the **Filter Builder** to target all Windows endpoints within those groups.
4. In the **Trigger Conditions** section, add conditions that must be met for the playbook run to start. Click **Question Criteria** and filter on all endpoints with a specific set of criteria. For example, you can type `Application Crashes Yesterday` in the **Filter Bar** or use the **Filter Builder** to filter endpoints to the results of the Application Crashes Yesterday sensor.
5. In the **Run Playbook Scope** section, select the scope for the targeted endpoints.
    - **Limited endpoints** runs on endpoints that meet both the playbook step targeting and the trigger target and condition.
    - **All Targeted Endpoints** runs on all endpoints targeted by the playbook step targeting, regardless of the trigger target and condition.
6. If the playbook contains parameters, in the **Steps** section, define parameter values for each triggered playbook run to use.
7. Click **Create**.

Edit or clone a playbook trigger

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, select a playbook.
3. Click the **Triggers** tab.
4. You have the following options:
    - Click Actions ⋮, then click **Edit** to edit the trigger.
    - Click Actions ⋮, then click **Clone** to create a copy of the trigger.

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5. If the trigger was disabled because the playbook parameters were edited and require review, review and confirm the parameter values in the **Steps** section.
6. When finished, click **Save**.

Enable a disabled playbook trigger

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, select a playbook.
3. Click the **Triggers** tab.
4. For a disabled trigger, click Actions , then click **Enable**.

Result

Note: If a trigger is disabled because the playbook parameters were edited and require review, you must edit the trigger to confirm the parameter values before you can enable it. See Edit or clone a playbook trigger on page 58.

Disable or delete a playbook trigger

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** tab, select a playbook.
3. Click the **Triggers** tab.
4. You have the following options:
   - Click Actions , then click **Disable** to disable the trigger.
   - Click Actions , then click **Delete** to delete the trigger.

Run playbook from Gateway

You can use Tanium Gateway to create playbooks, add scheduling to playbooks, and to initiate manual playbook runs.

For more information about how to run playbooks from Gateway, see Reference: Gateway examples for Automate on page 83.

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Run playbook from Reporting report

About this task

You can create a playbook run from a report in Tanium Reporting using an existing playbook. For more information, see Tanium Reporting User Guide: Working with Reporting reports.

Select one or more endpoints to define a limiting group. The limiting group constrains all playbook step targeting to only those endpoints that are members of the limiting group. Steps that target endpoints first check for limiting group membership, and then apply step targeting to the limiting group membership to determine the actual targeted endpoints.

Note: To create a playbook run from a report, you must have the **Automate Playbook execute** permission on the content set assigned to a playbook to start a playbook run, and the **Report read** permission to create the playbook run from the report.

1. Perform one of the following steps:
   - From the Main menu, go to **Data** > **Reports**. Open an existing report that contains data from endpoints that require the action or playbook run. For more information, see Tanium Reporting User Guide: View reports.
   - From the Main menu, go to **Data** > **Dashboards**. Open an existing dashboard and click the chart name or a data point in the chart. For more information about dashboards, see Tanium Reporting User Guide: View Reporting dashboards.
   - From the Main menu, go to **Data** > **Explore Data**. Configure the **Explore Data** page to show data from endpoints that require the action or playbook run. For more information, see Tanium Reporting User Guide: Explore data and create reports.
2. Select one or more endpoint result rows, then click **Actions** > **Start Playbook**.
3. Select a **Contains Action** value, or enter a **Filter items** value to filter the available playbooks to only those that contain the selected value.
4. Click **Review Playbook** in the row for the playbook that you want.
   The **Review Playbook** page appears.
5. Review the playbook settings to ensure they match your expectations and then click **Start**.

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Run playbook from Reporting dashboard

About this task

You can create a playbook run from a dashboard action panel in Tanium Reporting using an existing playbook. For more information, see Tanium Reporting User Guide: Working with Reporting dashboards.

The endpoints in the panel define a limiting group. The limiting group constrains all playbook step targeting to only those endpoints that are members of the limiting group. Steps that target endpoints first check for limiting group membership, and then apply step targeting to the limiting group membership to determine the actual targeted endpoints.

Note: To create a playbook run from a dashboard, you must have the **Automate Playbook execute** permission on the content set assigned to a playbook to start a playbook run, and the **Dashboard read** permission to create the playbook run from the dashboard.

1. From the Main menu, go to **Data** > **Dashboards**. Open an existing dashboard and go to an action panel. For more information about dashboards, see Tanium Reporting User Guide: View Reporting dashboards.
2. Click <Action label>. The action label depends on the action panel configuration. If there are multiple actions, the button becomes a **Deploy Action or Run Playbook** dropdown list that lists the label for each action. For more information, see Tanium Reporting User Guide: Add action panels.
   The **Review Playbook** page appears.

   Note: The **Total Eligible Endpoints** count on this page might be different from the endpoint count on the originating dashboard, because this count includes only endpoints that are currently online, while the dashboard count can include endpoints that are currently offline.
3. Review the playbook settings to ensure they match your expectations and then click **Start**.

Run playbook from Interact

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About this task

You can create a playbook run from Tanium™ Interact. After you issue a question, analyze the results, and determine which endpoints need automated workflows, you can deploy a series of actions as steps using an existing playbook. You can run a playbook multiple times to streamline and simplify your business processes.

Select one or more endpoints to define a limiting group. The limiting group constrains all playbook step targeting to only those endpoints that are members of the limiting group. Steps that target endpoints first check for limiting group membership, and then apply step targeting to the limiting group membership to determine the actual targeted endpoints.



Note: To create a playbook run from Interact, you must have the **Automate Playbook read** permission to see the **Start a Playbook** button on the **Question Results** page and the **Automate Playbook execute** permission on the content set assigned to a playbook to start a playbook run, and the **Report read** permission to create the playbook run from the report.

Initiate an existing playbook

1. Issue a dynamic question (see Issue a free-form question) or a saved question (see Issue a saved question).
2. When the **Question Results** page shows the results, select up to 100 rows for the endpoints that require the playbook.
3. Click **Start a Playbook**. The **Select a Playbook** dialog provides the following options for finding specific playbooks and assessing whether they are appropriate for the target endpoints:
   - Enter a text string that matches all or part of a playbook name in the **Filter items** field to find a specific playbook.
   - Expand the **Limiting Group** to see the syntax of the targeting question. Click the endpoint count to issue the question and see the results in a new browser tab.
   - Expand a playbook to see its steps.
4. Click **Review Playbook** in the row for the playbook that you want, review the playbook settings to ensure they match your expectations, and click **Start**.

Result

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For information about viewing, running, or creating a playbook, see Tanium Automate User Guide.

Pause playbook run

About this task

When you pause a playbook run, the run pauses after the current step completes. You can resume a playbook run after you pause the run. To pause a playbook run, you must have the same permissions as required to run the playbook. For more information, see Before you begin on page 49.

1. From the Main menu, go to **Automate** > **Overview**, and then open the **Playbook Runs** tab.
2. In the **Playbooks** tab, find the row for the playbook, click Actions , and then select **Pause**.

Resume playbook run

About this task

You can resume a playbook run that was previously paused. To resume a playbook run, you must have the same permissions as required to run the playbook. For more information, see Before you begin on page 49.

1. From the Main menu, go to **Automate** > **Overview**, and then open the **Playbook Runs** tab.
2. In the **Playbooks** tab, find the row for the playbook, click Actions , and then select **Resume**.

Stop playbook run

About this task

To stop a playbook run, you must have the same permissions as required to run the playbook. For more information, see Before you begin on page 49.

When you stop a playbook run, the behavior of the current step depends on the step type. Targeting steps such as **Deploy Action** and **Verify Condition** continue to run on endpoints until they complete or time out. Non-targeting steps such as **Wait**, **Manual Instruction**, and **User Confirmation** end immediately. Regardless of the step type, the stopped playbook no longer logs additional activity. Stopped playbook runs cannot be restarted.

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1. From the Main menu, go to **Automate** > **Overview**, and then open the **Playbook Runs** tab.
2. In the **Playbooks** tab, find the row for the playbook, click Actions , and then select **End**.

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Managing playbooks

Manage the playbooks in your environment and monitor playbook runs.

View playbooks

1. From the Main menu, go to **Automate** > **Overview**.
   The **Automate Overview** page appears with the **Playbooks** tab open in the **Playbooks** section.

2. (Optional) Use the following search and filter options to find specific playbooks if the list of playbooks is long. The list shows only the playbooks that match all the filters and search text that you specify.

   ### Playbooks search and filter options

Option	Description
Search by text	Enter an alphanumeric string in the **Filter items** field to match text in the **Playbook Name** column.
Filter by playbooks with scheduled runs	For the **Schedules** toggle, select **All** to show all playbooks, select **Yes** to show only playbooks with scheduled runs, or select **No** to show only playbooks with no scheduled runs.
Filter by playbooks with disabled schedules	For the **Disabled Schedules** toggle, select **All** to show all playbooks, select **Yes** to show only playbooks with at least 1 disabled schedule, or select **No** to show only playbooks with all enabled schedules, or no schedules.
Filter by field	Expand **Filters** and specify any additional filters. You can filter by **Playbook Name** and **Author** .

3. Expand any playbook to view basic details for the playbook.

4. Click a **Playbook Name** to open that playbook. You can then perform the following tasks:

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Playbook tasks

Task	Description
View steps	The **Steps** section shows the steps of the playbook in sequential order. Expand any step to view details for the step.
View run history	Click the **Run History** tab to view active and completed runs for the playbook. Enter an alphanumeric string in the **Filter items** field to match text in the **Status** and **Started By** columns. To view details for a run, click the date in the **Run Started** column.
View playbook schedules	Click the **Schedules** tab to view all schedules associated with the playbook. The number reflects the total count of schedules for this playbook. Enter an alphanumeric string in the **Filter items** field to match text in the **Status** and **Scheduled By** columns. To view details for a run, click the date in the **Run Started** column.
Edit playbook schedule	From the **Schedules** tab, click Actions then click **Edit**. For more information, see Edit or clone a playbook schedule on page 54.
Clone playbook schedule	From the **Schedules** tab, click Actions then click **Clone**. For more information, see Edit or clone a playbook schedule on page 54.
Disable an enabled playbook schedule	From the **Schedules** tab, click Actions then click **Disable**. For more information, see Disable or delete a playbook schedule on page 55.
Enable a disabled playbook schedule	From the **Schedules** tab, click Actions then click **Enable**. For more information, see Enable a disabled playbook schedule on page 56.
Delete playbook schedule	From the **Schedules** tab, click Actions then click **Delete**. For more information, see Disable or delete a playbook schedule on page 55.
View triggers	Click the **Triggers** tab to view all triggers associated with the playbook and their enabled or disabled

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Task	Description
	state. For more information, see Trigger playbook runs on page 56 .
Edit trigger	From the **Triggers** tab, click Actions then click **Edit** . If the trigger is disabled, an **Enabled** toggle appears at the top of the edit form so you can re-enable it directly from the edit view. For more information, see Edit or clone a playbook trigger on page 58 .
Clone trigger	From the **Triggers** tab, click Actions then click **Clone** . For more information, see Edit or clone a playbook trigger on page 58 .
Enable a disabled playbook trigger	From the **Triggers** tab, click Actions then click **Enable** . For more information, see Enable a disabled playbook trigger on page 59 .
Disable an enabled playbook trigger	From the **Triggers** tab, click Actions then click **Disable** . For more information, see Disable or delete a playbook trigger on page 59 .
Delete playbook trigger	From the **Triggers** tab, click Actions then click **Delete** . For more information, see Disable or delete a playbook trigger on page 59 .
Start playbook run	Click **Start** to run the playbook. The option to start a playbook run is enabled only if you have permissions to run the playbook. For more information, see Running playbooks on page 49 .
Edit playbook	Click **Edit** . The option to edit the playbook is enabled only if you have the **Automate Playbook write** permission on the playbook content set. For more information, see Edit a playbook on page 38 .
Schedule playbook runs	Click **Actions** and select **Schedule** . For more information, see Schedule playbook runs on page 51 .
Clone playbook	Click **Actions** and select **Clone** . For more information, see Clone a playbook on page 42 .
Export playbook	Click **Actions** and select **Export** . For more information, see Export and import playbooks on page 42 .

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Task	Description
Delete playbook	Click **Actions** and select **Delete**. For more information, see Delete a playbook on page 44.

5. (Optional) If the source package used by a step is updated or deleted, a warning banner stating the package is out of sync with its source appears above the **Steps** section. Click **Review Step N** to open that step for editing. For more information, see Troubleshoot a package that is out of sync with its source on page 76.

View playbook run

About this task

You can view details for playbook runs that ended in the last 30 days, as well as runs that are still in progress. The following icons signify playbook run status:

- - The playbook run completed all steps without any errors.
- - The playbook run is waiting for a manual user confirmation, such as at the Manual Instruction or Require User Confirmation step.
- - The playbook run returned an error and ended.
- - The playbook run ended before completing all steps, but did not return an error, such as when a user manually ends a playbook run.

1. Choose from the following:
   View runs from all playbooks
   a. From the Main menu, go to **Automate** > **Overview**. Go to the **Playbook Runs** tab.
   b. (Optional) Use the following search and filter options to find a specific playbook run if the list is long. The list shows only the playbook runs that match all the filters and search text that you specify.

Playbook runs search and filter options

Option	Description
Search by text	Enter an alphanumeric string in the **Filter items** field to match text in the **Playbook**

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Option	Description
	Name column.
Filter by playbooks with runs	For the **Scheduled** toggle, select **All** to show all playbook runs, select **Yes** to show only scheduled runs, or select **No** to show only unscheduled playbook runs.
Filter by playbook status	For the **Ended** toggle, select **All** to show all playbook runs, select **Yes** to show only runs that ended, or select **No** to show only runs that are in progress.
Filter by date	For the **Date Range** toggle, select **All** to show all playbook runs, or select **Last 7 Days** to show all playbook runs that started within the prior 7 days.
Filter by field	Expand **Filters** and specify any additional filters. You can filter by **Status**, **Playbook Name**, and **Initiator**.

c. Click the **Playbook Name** of the run that you want to view.

View runs from a single playbook

a. From the Main menu, go to **Automate** > **Overview**. Go to the **Playbooks** tab.
b. Click the **Playbook Name** to open playbook details.
c. Go to the **Run History** tab and click the value in the **Run Started** column for the run that you want to view.

2. Review the **Time Remaining** for the active step. The time remaining depends on the step type and whether verification is enabled:
   - Steps without verification enabled: The **Time Remaining** matches the Step Duration configured for the step.
   - Steps with verification enabled (such as Deploy Software and Install Patch): The **Time Remaining** is the Step Duration plus up to an additional 10 minutes for verification.
   - Deploy Action steps with verification enabled: The **Time Remaining** is the total of Step Duration, package verify timeouts (if configured), and up to an additional 10 minutes for verification.
   - Deploy Action steps with action approval enabled: The **Time Remaining** does not appear until the action is approved. After approval, it follows the same rules as Deploy Action steps (with or without verification).
3. Expand any step to view details for the step or click **Expand All** to expand all steps in the playbook run.

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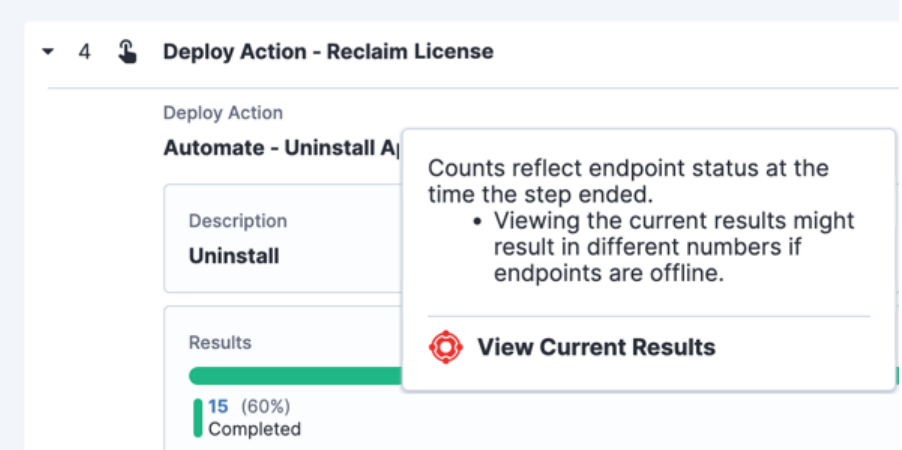
4. (Optional) If a playbook run step potentially acted on endpoints, such as Deploy Action or Install Patch, you can view more information on targeted endpoints.
    - To view details on the **Question Results** page, click the **Results** horizontal stacked bar chart and then click **View Current Results**. For more information, see Tanium Interact User Guide: Managing question results in Interact.



> **Note:** The total number of endpoints on the **Question Results** page might be different from the total number of endpoints listed in the step results. The step results reflect the endpoint count at the time that the step ended. If endpoints go offline, the **Question Results** page does not show these endpoints.

    - To view details about a Patch deployment, click **View in Patch**.

5. If a playbook run step deployed a simple action, such as Deploy Action, you can pivot to the **Action Status** page to view information about the simple action. Click Action History. For more information, see Tanium Console User Guide: View status for simple actions.

6. (Optional) If the run is in progress and has an active manual step, expand the step to view and complete any instructions. When finished, add any comments and complete the step:
    - For **Manual Instruction** steps, click **Mark Complete**.
    - For **Require User Confirmation** steps, click **Continue** to continue to the next step, or **End** to end the playbook run.

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Maintaining Automate

Perform monthly maintenance tasks to ensure that Automate successfully performs scheduled activities on all targeted endpoints and does not overuse endpoint or network resources. If Automate is not performing as expected, you might need to troubleshoot issues or change settings. For more information, see Troubleshooting Automate on page 72 for related procedures.

Automate monthly maintenance

1. Review playbook run logs to ensure Tanium™ Automate playbook runs are running successfully and targeting the intended endpoints. For more information, see Tanium Automate User Guide: View playbook run.
2. Review playbook runs to ensure there are no runs that are waiting for manual steps. For more information, see Tanium Automate User Guide: View playbook run.
3. To optimize performance, review playbook runs and playbook run logs to ensure playbooks are not running excessively. For more information, see Tanium Automate User Guide: View playbook run.
4. Ensure that any Tanium solutions used by Automate in your environment are running and updated. For more information, see Tanium Automate User Guide: Solution dependencies.
5. Delete temporary and obsolete playbooks. For more information, see Tanium Automate User Guide: Delete a playbook.
6. Review which users have access to playbooks. For more information, see Tanium Automate User Guide: Set up Automate users.

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Troubleshooting Automate

If Automate is not performing as expected, you might need to troubleshoot issues or change settings. For more information about specific settings, see Automate requirements on page 20.

Collect logs

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 **Automate Overview** page, click Help ?, and then go to the **Troubleshooting** tab.
2. Click **Download Support Bundle**. A tanium-Automate-support-[timestamp].zip file downloads to the local download directory.
3. Contact Tanium Support to determine the best option to send the ZIP file. For more information, see Contact Tanium Support on page 80.

Troubleshoot playbook import errors

If importing a playbook JSON file returns an error, ensure that:

- the target environment has the same prerequisite solutions and content as the environment from which the playbook was exported.
- your user account is assigned the necessary roles and permissions to view the playbook and associated content.
- the playbook import file JSON schema definition has not changed, and all expected components are defined.

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Troubleshoot playbook validation timeouts

When you save, run, or schedule a playbook, or when you configure a playbook trigger, Automate validates any steps that depend on another Tanium solution, such as Deploy or Connect. If the solution's service does not respond in time, you might see the following error:

```
Playbook validation timed out. A service required to validate one of the steps might be unavailable. Try again.
```

This error is retryable and does not mean your playbook is misconfigured. Wait a few moments, then try the action again. If the error persists, Contact Tanium Support on page 80 to confirm that the required solution's service is running.

Troubleshoot failed playbook runs

Playbook runs that return an error before completion generally return one of the following error types.

Playbook error types

Playbook error type	Description
overall playbook processing	The playbook run cannot complete any playbook steps. This generally indicates an issue with Automate starting and running a playbook, such as if an Automate service is not running, or if Automate cannot establish communications with Gateway.
playbook step processing	A specific playbook run step fails to complete. Because step functionality varies, issues can be varied, but might include invalid endpoint targeting, insufficient permissions to access package or sensor content used in a playbook, action timeouts, or other such causes.

Identify a playbook run error type

1. From the Main menu, go to **Automate** > **Overview**.

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2. In the **Playbooks** section, click **Playbook Runs**.
3. Expand the **Filters** section. Then select **Ended with errors** from the **Status** field to view all failed playbook runs.
4. Select a **Playbook Name** to view details for a failed playbook run. The **Status** notes if a playbook run failed on a specific step.
5. You have the following options:
    - If the playbook run failed before starting any playbook step, Contact Tanium Support on page 80 to review the Automate service logs and diagnose and remediate the root cause.
    - If the playbook run failed at a specific playbook step, see Troubleshoot Deploy Action step errors on page 74, Troubleshoot Install Patch step errors on page 77, Troubleshoot Verify Condition step errors on page 77, or Troubleshoot other playbook step failures on page 79.

Troubleshoot Deploy Action step errors

If a **Deploy Action** step returns an error, review the endpoints targeted by the step, review the action details in the action history, or reissue the action to a test endpoint in the action history.



Note: Before troubleshooting, see Tanium Console User Guide: Action best practices. For more information about action statuses, see Tanium Console User Guide: View action status.

Review endpoints targeted by a Deploy Action step

If the **Deploy Action** step is running, but endpoints are returning errors, review the step count for specific endpoints with a status of **Error**.

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** section, click **Playbook Runs**.

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3. Expand the **Filters** section. Then select **Ended with errors** from the **Status** field to view all failed playbook runs.
4. Select a **Playbook Name** to view details for a failed playbook run.
5. Click the **Deploy Action** step to expand step details.
6. In the **Results** section, click **Error**. Then click **View Current Results** to view these endpoints.

> **Note:** The endpoint results after the step completes reflect the action deployment status at the time of step completion. The current results reflect only the endpoints that are currently online.

Review a Deploy Action step action details

If the **Deploy Action** step is complete and you want to verify the action details, you can view the action history which tracks the actions started from playbook runs. You can review the details of these actions and determine if the **Deploy Action** step configuration aligns with the actual result.

1. From the Main menu, go to **Administration** > **Actions** > **Action History**.
2. Expand the **Filters** section. Select the **Action Name** attribute and the **contains** operator. Then enter `Automate - Deploy Action` and click Apply ✓. All platform package actions that originate from Automate have this action name.
3. Identify the action you want to review based on **Package Name**, **Issuer**, and **Start Time**.
4. Select an action. Click **Show Status** to view the action details.

Reissue a Deploy Action step action

If the **Deploy Action** step is complete but did not produce the desired results, you can reissue the action on a test endpoint. Review the results to ensure that the action completes successfully and performs as expected.

1. From the Main menu, go to **Administration** > **Actions** > **Action History**.

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2. Expand the **Filters** section. Select the **Action Name** attribute and the **contains** operator. Then enter `Automate - Deploy Action` and click Apply ✓. All platform package actions that originated from Automate have this action name.

3. Identify the action you want to review based on **Package Name**, **Issuer**, and **Start Time**.

4. Select an action. Click **Show Status** to view the action details.

5. Click **Reissue**.

6. Select an **Action Group** that contains only a test endpoint or is otherwise limited to a controlled set of endpoints. Then click **Show Preview to Continue**.

7. If the **Targeting Criteria** does not contain the expected endpoints, select a different **Action Group**.

8. Click **Reissue Action**, then confirm the action.

   If the action does not complete as expected, see Tanium Console User Guide: Troubleshooting Console and Interact.

Troubleshoot a package that is out of sync with its source

Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot until you take action.

1. Open the step that has the warning banner.

   - From the Playbook Details page, click **Review Step N** in the warning banner.
   - From a schedule or trigger with parameter overrides, click **Review this step** in the warning banner.

2. If the source package still exists, click **View Source Package** to review the current version of the package before you decide what action to take.

3. If a newer version of the package is available, click **Update Package**. Parameter values carry over automatically where the parameter name and type match the new version. Review any parameters that were removed or changed.

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4. If the source package is deleted and the step lets you select the package, select a different package for the step.

Troubleshoot Install Patch step errors

If an **Install Patch** step returns an error, review the corresponding Patch install deployment details, including deployment errors.



Note: For more information about troubleshooting Patch install deployments, see Tanium Patch User Guide: Reference: Common Patch errors.

1. From the Main menu, go to **Modules** > **Patch** > **Deployments**.
2. You have the following options:
   - If the deployment is still running, click **Active**.
   - If the deployment is not running, click **Inactive**.
3. Expand the **Filters** section. Select a deployment name containing `Deployment - Tanium Automate`. All Patch deployments that originate from Automate have this deployment name.
4. Expand a deployment to view the details, including the creation time. Based on the playbook start time, click the deployment **Name** that corresponds to the **Install Patch** step.
5. Review the errors in the **Deployment Errors** section.

Troubleshoot Verify Condition step errors

If the **Verify Condition** step does not return the expected results, issue the verification question within Tanium Interact as a question.

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Note: If you receive specific messages that indicate a problem with returning question results, see Tanium Console User Guide: Troubleshoot Interact issues.

1. From the Main menu, go to **Automate** > **Overview**.
2. In the **Playbooks** section, click **Playbook Runs**.
3. Expand the **Filters** section. Then select **Ended with errors** from the **Status** field to view all failed playbook runs.
4. Select a **Playbook Name** to view details for a failed playbook run.

   The **Status** notes if a playbook run failed on a specific step.
5. Click the failed **Verify Condition** step to expand step details.
6. Copy the following question template and paste it into a plaintext editor:

   ```
   Get [Meet Condition] from [Target Endpoints - Computer Groups] and from all computers with [Target Endpoints - Question Criteria]
   ```
7. Copy the **Meet Condition** value from the **Verify Condition** step and paste it into the question template, replacing `[Meet Condition]`.
8. Copy the **If any of the following targets** value from the **Verify Condition** step and paste it into the question template, replacing `[Target Endpoints - Computer Groups]` with a target computer group and replacing `[Target Endpoints - Question Criteria]` with target question criteria. Delete any unused clause from the question template.

   Note: Depending on the complexity of your **Verify Condition** step, you might have to further adjust the question template.
9. Copy the updated question template and paste it into the quick search bar in the Console header to ask the question. Compare the actual results to your expected results and adjust your configuration as needed.

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Troubleshoot other playbook step failures

If playbook runs continue to fail after following troubleshooting information on this page, Contact Tanium Support on page 80 to review the Automate service logs and diagnose and remediate the root cause.

Uninstall Automate

When you uninstall Automate, any collected data is saved by default so that you can restore the data if you later decide to reinstall Automate. In some cases, you might want to start "clean" and not restore the data. To do this, you must manually uninstall some files.

> **Important:** Consult with Contact Tanium Support on page 80 before you uninstall or reinstall Automate.

What happens when you uninstall Automate?

When you uninstall Automate, Tanium Console removes:

- Automate workbench

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

- Automation Engine Service
- Collected data at <Tanium Module Server>\services\automate-files\
- Collected data at <Tanium Module Server>\services\automation-files\
- Playbook configurations
- Playbook run logs

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Uninstall Automate so data is restored when you reinstall

1. Sign in to Tanium Console as a user with the Administrator role.
2. From the Main menu, go to **Administration** > **Configuration** > **Solutions**.
3. Under Automate, click **Uninstall**.
4. Review the summary and click **Uninstall**.
5. When prompted to confirm, enter your password and click **OK**.

If you later install Automate, the previous playbooks are restored.

> **Note:** In an Active-Active deployment, the Automate workbench and Automate menu remain on the cluster member on which the uninstallation was not run. The Automate workbench must be manually removed from that instance. Contact Contact Tanium Support on page 80 for assistance. For more information about Active-Active deployments, see Tanium Core Platform User Guide for Windows Deployments: Installing Tanium Servers in an active-active HA cluster.

Uninstall Automate so you start fresh when you reinstall

1. Uninstall Automate as described in the previous section.
2. Manually delete the following:
    - Automate files at <Tanium Module Server>\services\automate-files\

Contact Tanium Support

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

For more information about submitting a support case, see Case Submission Form.

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Reference: Cron syntax for Automate

Automate uses a variation of the standard cron format. Use the following quick reference and examples to build your cron expressions.

```
┌──────────── minute
│ ┌────────── hour
│ │ ┌──────── day of month
│ │ │ ┌────── month
│ │ │ │ ┌──── day of week
│ │ │ │ │
│ │ │ │ │
* * * * *
```

Each asterisk is a field that must be included in the cron expression. The field value can be one of the following values:

Valid values for cron fields

Field	Single integer or string values	Multiple values
minute	`0` - `59`	• step increments represented by a slash (`/`) • list of values separated by commas (`,`) • integer range separated by a hyphen (`-`) • asterisk (`*`) to represent all possible values
hour	`0` - `23`	
day of month	`1` - `31`	
month	• `1-12` • `JAN-DEC`	
day of week	• `0-7` (Sunday is `0` and `7`) • `SUN-SAT`	

Note the following:

- The following characters are not supported: `H`, `L`, `W`, `#`, `?`, `(`, `)`
- The year field and second field are not supported.
- Automate uses a variation of the standard cron format where specific values in both the day

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of month and day of week fields result in playbook runs only when both match. For example, the cron expression `* * 1 * 1` matches days that are both the first day of the month and a Monday.

Cron expression examples

Use the following cron expressions to schedule playbook runs around Patch Tuesday:

- Patch Tuesday (second Tuesday of each month): `0 21 8-14 * 2`. Runs at 9:00 PM on a Tuesday between the 8th and 14th.
- Day after Patch Tuesday: `0 21 9-15 * 3`. Runs at 9:00 PM on a Wednesday between the 9th and 15th.



Note: These examples show a variation of the standard cron syntax as used by Automate.

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Reference: Gateway examples for Automate

Tanium Gateway provides a GraphQL API integration point for Tanium solutions, including Automate. Automate queries and mutations require Automate to create, retrieve, update, and delete playbooks and playbook runs, and start a playbook run from a playbook.

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

Automate query filter syntax

Automate queries that request playbook information (`query.playbooks`) support the following filter fields:

- `authorUserIDs`
- `contentSets`
- `createdAfterTime`
- `createdBeforeTime`
- `hasDisabledSchedules`
- `ids`
- `isScheduled`
- `name`

Automate queries that request playbook information support sorting the response on the following filter fields in ascending (`asc`) or descending (`desc`) order:

- `activeRunsCount` based on number count

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- `name` based on alphabetical order
- `schedulesCount` based on number count

If you do not define a sort order, the query defaults to sorting on `name` in `asc` order.

Automate queries that request playbook run information (`query.playbookRuns`) support the following filter fields:

- `createdAfterTime`
- `createdBeforeTime`
- `hasErrors`
- `startReason.startTypes`
- `playbookIDs`
- `playbookName`
- `runAsUserIDs`
- `statuses`

Automate queries that request playbook run information support sorting the response on the following filter fields in ascending (`asc`) or descending (`desc`) order:

- `endTime` based on chronological order
- `name` based on alphabetical order
- `scheduleStartTime` based on chronological order
- `startTime` based on chronological order
- `status` based on playbook run lifecycle order, from creation to completion

If you do not define a sort order, the query defaults to sorting on `status` in `asc` order.

Automate queries that request playbook schedule information (`query.playbookSchedules`)

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support the following filter fields:

- `excludedScheduledByIDs`
- `isEnabled`
- `playbookIDs`
- `scheduledByIDs`

The `playbooks`, `playbookRuns`, and `playbookSchedules` queries require Automate 1.3 or later and the **Automate Playbook read** permission.

For more information on filter syntax, see `PlaybookFieldFilter` and `PlaybookRunFieldFilter` in the **Documentation Explorer** pane of the query explorer. For more information on sort syntax, see `PlaybookFieldSort`, `PlaybookSortField`, `PlaybookRunFieldSort`, and `PlaybookRunSortField` in the **Documentation Explorer** pane of the query explorer.

Playbooks belonging to a content set

You can retrieve playbooks belonging to a content set by content set ID or name. Define a filter object using the following syntax to filter by content set ID:

```
filter {
  contentSets:
    [
      {id: content-set-id-value-1},
      {id: content-set-id-value-2},
      {id: content-set-id-value-n}
    }
  ]
}
```

Define a filter object using the following syntax to filter by content set name:

```
filter {
  contentSets:
    [
      {name: content-set-name-value-1},
      {name: content-set-name-value-2},
      {name: content-set-name-value-n}
    }
  ]
}
```

For example, the following query retrieves the first two playbooks belonging to the content set with

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the ID `123`:

```
query exampleGetPlaybooksContentSetID($first: Int, $contentSetID: ID) {
  playbooks(first: $first, filter: {contentSets: [{id: $contentSetID}]}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first": 2,
  "contentSetID" : "123"
}
```

The following query retrieves the first two playbooks belonging to the content set with the name `Example content set`:

```
query exampleGetPlaybooksContentSetName($first: Int, $contentSetName: String) {
  playbooks(first: $first, filter: {contentSets: [{name: $contentSetName}]}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
```

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```
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first": 2,
  "contentSetName" : "Example content set"
}
```

Playbooks or playbook runs created after a time

You can retrieve playbooks and playbook runs created after a date. If you retrieve a playbook, you can also retrieve associated playbook runs created before a date. Define a filter object using the following syntax:

```
filter {
  createdAfterTime: time-value
}
```

For example, the following query retrieves the first two playbooks created after June 1, 2023:

```
query exampleGetPlaybooksAfter($first: Int, $create: Time) {
  playbooks(first: $first, filter: {createdAfterTime: $create}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first" : 2,
  "create" : "2023-06-01T01:02:03Z"
}
```

The following query retrieves the first two playbook runs created after June 1, 2023:

```
query exampleGetPlaybookRunsAfter ($first: Int, $create: Time) {
  playbookRuns(first: $first, filter: {createdAfterTime: $create}) {
    edges {
      node {
        createdTime
        endTime
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
          taskArgument {
            __typename
          }
          }
          updatedTime
        }
        runAs {
          persona {
            id
          }
          user {
            id
          }
        }
        scheduleStartTime
```

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```
        startTime
        status
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first" : 2,
  "create" : "2023-06-01T01:02:03Z"
}
```

Playbooks or playbook runs created before a time

You can retrieve playbooks and playbook runs created before a date. If you retrieve a playbook, you can also retrieve associated playbook runs created before a date. Define a filter object using the following syntax:

```
filter {
  createdBeforeTime: time-value
}
```

For example, the following query retrieves the first two playbooks created before June 1, 2023:

```
query exampleGetPlaybooksBefore($first: Int, $create: Time) {
  playbooks(first: $first, filter: {createdBeforeTime: $create}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
```

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```
    totalRecords
  }
}
```

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

```
{
  "first" : 2,
  "create" : "2023-06-01T00:00:00Z"
}
```

The following query retrieves the first two playbook runs created before June 1, 2023:

```
query exampleGetPlaybookRunsBefore($first: Int, $create: Time) {
  playbookRuns(first: $first, filter: {createdBeforeTime: $create}) {
    edges {
      node {
        createdTime
        endTime
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
        runAs {
          persona {
            id
          }
          user {
```

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```
            id
          }
        }
        scheduleStartTime
        startTime
        status
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first" : 2,
  "create" : "2023-06-01T00:00:00Z"
}
```

Playbooks configured with a playbook schedule

You can retrieve playbooks associated with at least one configured playbook schedule. Define a filter object using the following syntax:

```
filter {
  isScheduled: boolean-value
}
```

For example, the following query retrieves the first two playbooks with a configured schedule:

```
query exampleGetPlaybooksScheduled($first: Int, $isScheduled: Boolean) {
  playbooks(first: $first, filter: {isScheduled: $isScheduled}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
```

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```
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first" : 2,
  "isScheduled" : true
}
```

Playbooks configured with at least one disabled playbook schedule

You can retrieve playbooks associated with at least one configured playbook schedule that is also disabled. Define a filter object using the following syntax:

```
filter {
  hasDisabledSchedules: boolean-value
}
```

For example, the following query retrieves the first two playbooks with at least one configured schedule that is also disabled:

```
query exampleGetPlaybooksScheduleDisabled($first: Int, $hasDisabledSchedules: Boolean) {
  playbooks(first: $first, filter: {hasDisabledSchedules: $hasDisabledSchedules}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

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```
{
  "first" : 2,
  "hasDisabledSchedules" : true
}
```

Playbooks with a referenced name

You can retrieve playbooks configured with a given name. Define a filter object using the following syntax:

```
filter {
  name: name-value
}
```

For example, the following query retrieves playbooks with the name `Example playbook`:

```
query exampleGetPlaybooksNamed($name: String) {
  playbooks(filter: {name: $name}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "name" : "Example playbook"
}
```

Playbooks with a referenced author ID

You can retrieve playbooks created by a given user ID. Define a filter object using the following syntax:

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```
filter {
  authorUserIDs: [user-id-value-1,user-id-value-2,user-id-value-n]
}
```

For example, the following query retrieves the first two playbooks created by user ID `123`:

```
query exampleGetPlaybooksAuthor($first: Int, $authorUserIDs: [ID!]) {
  playbooks(first: $first, filter: {authorUserIDs: $authorUserIDs}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first": 2,
  "authorUserIDs" : "123"
}
```

Playbooks with a referenced ID

You can retrieve playbooks with a given ID. Define a filter object using the following syntax:

```
filter {
  ids: [
    playbook-id-value-1,
    playbook-id-value-2,
    playbook-id-value-n
  ]
}
```

For example, the following query retrieves the playbooks with the IDs `12345678-90ab-cdef-1234-567890abcdef` and `fedcba09-8765-4321-fedc-ba0987654321`:

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```
query exampleGetPlaybooksByID($playbookID1: ID!, $playbookID2: ID!) {
  playbooks(filter: {ids: [$playbookID1, $playbookID2]}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "playbookID1": "12345678-90ab-cdef-1234-567890abcdef",
  "playbookID2": "fedcba09-8765-4321-fedc-ba0987654321"
}
```

Playbook runs and playbook schedules associated with a playbook ID

You can retrieve playbook runs and playbook schedules associated with a playbook, based on the playbook's ID. Define a filter object using the following syntax:

```
filter {
  playbookIDs: [
    playbook-id-1,
    playbook-id-2,
    playbook-id-n
  ]
}
```

The following query retrieves the first two playbook runs associated with the playbook ID `12345678-90ab-cdef-1234-567890abcdef`:

```
query exampleGetPlaybookRunsPlaybookName($first: Int, $playbookID: ID!) {
  playbookRuns(first: $first, filter: {playbookIDs: [$playbookID]}) {
    edges {
      node {
        createdTime
        endTime
```

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```
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
        runAs {
          persona {
            id
          }
          user {
            id
          }
        }
        scheduleStartTime
        startTime
        status
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

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```
{
  "first" : 2,
  "playbookID" : "12345678-90ab-cdef-1234-567890abcdef"
}
```

Playbook runs associated with a named playbook

You can retrieve playbook runs associated with a playbook, based on the playbook's name. This matches either the full playbook name or a string within the playbook name. For example, if you filter on `example playbook` in the playbook name, the playbook names `example playbook` and `testing example playbook step` both match. Define a filter object using the following syntax:

```
filter {
  playbookName: playbook-name
}
```

The following query retrieves the first two playbook runs associated with the playbook named `Example named playbook`:

```
query exampleGetPlaybookRunsPlaybookName($first: Int, $playbookName: String) {
  playbookRuns(first: $first, filter: {playbookName: $playbookName}) {
    edges {
      node {
        createdTime
        endTime
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
```

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```
            __typename
          }
        }
        updatedTime
      }
      runAs {
        persona {
          id
        }
        user {
          id
        }
      }
      scheduleStartTime
      startTime
      status
    }
  }
  pageInfo {
    hasPreviousPage
    hasNextPage
    startCursor
    endCursor
  }
  totalRecords
 }
}
```

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

```
{
  "first" : 2,
  "playbookName" : "Example named playbook"
}
```

Playbook runs associated with a `runAs` user ID

You can retrieve playbook runs whose `runAs` user matches the filter. If you retrieve a playbook, you can also retrieve associated playbook runs whose `runAs` user matches the filter. Define a filter object using the following syntax:

```
filter {
  runAsUserIDs: [
    user-ID-value-1,
    user-ID-value-2,
    user-ID-value-n..
  ]
}
```

The following query retrieves the first two playbook runs associated with the `runAs` user `1234`:

```
query exampleGetPlaybookRunsUser($first: Int, $runAsUserID: [ID!]) {
  playbookRuns(first: $first, filter: {runAsUserIDs: [$runAsUserID]}) {
    edges {
      node {
        createdTime
        endTime
```

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```
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
        runAs {
          persona {
            id
          }
          user {
            id
          }
        }
        scheduleStartTime
        startTime
        status
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

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```
{
  "first" : 2,
  "runAsUserID" : "1234"
}
```

Playbook runs by status

You can retrieve playbook runs based on their current status. If you retrieve a playbook, you can also retrieve associated playbook runs based on current status. Define a filter object using the following syntax:

```
filter {
  statuses: [
    enumerated-status-value-1,
    enumerated-status-value-2,
    enumerated-status-value-n
  ]
}
```

For information on playbook run status values, see `PlaybookRunStatus` in the **Documentation Explorer** pane of the query explorer.

The following query retrieves the first two playbook runs that are in progress:

```
query exampleGetPlaybookRunsSchedule($first: Int, $status: [PlaybookRunStatus!]) {
  playbookRuns(first: $first, filter: {statuses: $status}) {
    edges {
      node {
        createdTime
        endTime
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
```

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```
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
        runAs {
          persona {
            id
          }
          user {
            id
          }
        }
        scheduleStartTime
        startTime
        status
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first" : 2,
  "status" : "IN_PROGRESS"
}
```

Playbook runs initiated from a playbook schedule

You can retrieve playbook runs that were started due to a configured playbook schedule. Define a filter object using the following syntax:

```
filter {
  startReason: {startTypes: [SCHEDULE]}
}
```

The following query retrieves the first two playbook runs that started due to a configured playbook schedule:

```
query exampleGetPlaybookRunsStartedBySchedule($first: Int) {
  playbookRuns(first: $first, filter: {startReason: {startTypes: [SCHEDULE]}}) {
    edges {
      node {
        createdTime
        endTime
```

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```
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
        runAs {
          persona {
            id
          }
          user {
            id
          }
        }
        scheduleStartTime
        startTime
        status
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

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```
{
  "first" : 2
}
```

Playbook runs initiated by a user or trigger

You can retrieve playbook runs started due to a user action or from a trigger. Define a filter object using the following syntax:

```
filter {
  startReason: {startTypes: [USER, TRIGGER]}
}
```

The following query retrieves the first two playbook runs that started due to either a user action or a trigger:

```
query exampleGetPlaybookRunsStartedByUserOrTrigger($first: Int) {
  playbookRuns(first: $first, filter: {startReason: {startTypes: [USER, TRIGGER]}}) {
    edges {
      node {
        createdTime
        endTime
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
```

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```
        runAs {
          persona {
            id
          }
          user {
            id
          }
        }
        scheduleStartTime
        startTime
        status
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first" : 2
}
```

Playbook runs that generated errors

You can retrieve playbook runs that generated an error while running. If you retrieve a playbook, you can also retrieve associated playbook runs that generated an error. Define a filter object using the following syntax:

```
filter {
  hasErrors: boolean-value
}
```

The following query retrieves the first two playbook runs that generated an error while evaluating steps:

```
query exampleGetPlaybookRunsError($first: Int, $hasErrors: Boolean) {
  playbookRuns(first: $first, filter: {hasErrors: $hasErrors}) {
    edges {
      node {
        createdTime
        endTime
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
```

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```
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
        runAs {
          persona {
            id
          }
          user {
            id
          }
        }
        scheduleStartTime
        startTime
        status
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first" : 2,
  "hasErrors" : true
}
```

Playbook schedules that are enabled

You can retrieve playbook schedules that are enabled. Define a filter object using the following

syntax:

```
filter {
  isEnabled: boolean-value
}
```

The following query retrieves the first two enabled playbook schedules:

```
query exampleGetEnabledPlaybookSchedules($first: Int, $isEnabled: Boolean) {
  playbookSchedules(first: $first, filter: {isEnabled: $isEnabled}) {
    edges {
      node {
        createdTime
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first" : 2,
  "isEnabled" : true
}
```

Playbook schedules that are created by a referenced user ID

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You can retrieve playbook schedules that are created by a user based on user ID. Define a filter object using the following syntax:

```
filter {
  scheduledByIDs: [
    user-id-1,
    user-id-2,
    user-id-n
  ]
}
```

The following query retrieves the first two playbook schedules created by a user with the ID `123`:

```
query exampleGetPlaybookScheduleUserID($first: Int, $scheduledByID: ID!) {
  playbookSchedules(first: $first, filter: {scheduledByIDs: [$scheduledByID]}) {
    edges {
      node {
        createdTime
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first" : 2,
```

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```
  "ScheduledByID" : "123"
}
```

Playbook schedules that are not created by a referenced user ID

You can retrieve playbook schedules that are not created by a user based on user ID. Define a filter object using the following syntax:

```
filter {
  excludedScheduledByIDs: [
    user-id-1,
    user-id-2,
    user-id-n
  ]
}
```

The following query retrieves the first two playbook schedules that are not created by a user with the ID `123`:

```
query exampleGetPlaybookScheduleNotUserID($first: Int, $excludedScheduledByID: ID!) {
  playbookSchedules(first: $first, filter: {excludedScheduledByIDs:
[$excludedScheduledByID]}) {
    edges {
      node {
        createdTime
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
```

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```
  }
}
```

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

```
{
  "first" : 2,
  "excludedScheduledByID" : "123"
}
```

Playbooks or playbook runs results sorting

You can sort playbooks and playbook runs results. If you retrieve a playbook, you can also sort associated playbook runs. Define a sort object using the following syntax:

```
sort {
  field: field-name
  order: sort-order
}
```

For example, the following query sorts playbook results in descending order based on active run count:

```
query exampleGetPlaybooksSort($field: PlaybookSortField!, $order: SortOrder!) {
  playbooks(sort: {field: $field, order: $order}) {
    edges {
      node {
        createdTime
        description
        id
        name
        revision
        steps {
          description
          name
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "field" : "activeRunsCount",
```

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```
  "order" : "desc"
}
```

The following query sorts playbook run results in ascending order based on playbook run end time:

```
query exampleGetPlaybookRunsSort($field: PlaybookRunSortField!, $order: SortOrder!) {
  playbookRuns(sort: {field: $field, order: $order}) {
    edges {
      node {
        createdTime
        endTime
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
            taskArgument {
              __typename
            }
          }
          updatedTime
        }
        runAs {
          persona {
            id
          }
          user {
            id
          }
        }
        scheduleStartTime
        startTime
        status
      }
    }
    pageInfo {
```

```
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "field" : "endTime",
  "order" : "asc"
}
```

Add a playbook Add Custom Tag (Non-Windows) step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

> **Note:** This step type extends the **Deploy Action** step for a specific package. If you add this step type using a GraphQL request instead of through Tanium Console, the step name appears as **Deploy Action** when you edit the playbook. Confirm the package ID and name for your environment, as it might differ from the example syntax.

The **Add Custom Tag (Non-Windows)** step requires the following permissions to deploy the **Custom Tagging - Add Tags (Non-Windows)** package:

- **Interact Execute action** permission
- **Package read** permission is required on the **Core Content** content set.
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

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Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

The **Add Custom Tag (Non-Windows)** step deploys the **Custom Tagging - Add Tags (Non-Windows)** package to targeted endpoints, which assigns one or more custom tags to targeted endpoints.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Deploy Action** step that runs the **Custom Tagging - Add Tags (Non-Windows)** package on the targeted endpoints belonging to the **All Linux** computer group:

```
mutation exampleUpsertPlaybookAddTagLinux($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_add_tag_non_windows",
    "description": "Example playbook - Add Tags to Non-Windows Machine step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
```

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```
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_add_tag_non_windows_step",
        "description": "Example step 1: Add Tags to Non-Windows Machines",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Linux"
            },
            "negated": false,
            "any": true
          }
        },
                "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1200
            },
            "completionPercentage": 1,
            "package": {
              "id": "36",
              "name": "Custom Tagging - Add Tags (Non-Windows)",
              "params": [
                "example_tag"
              ]
            },
            "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_add_tag_non_windows",
        "steps": [
          {
            "description": "Example step 1: Add Tags to Non-Windows Machines",
            "name": "example_add_tag_non_windows_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
```

```
}
```

Add a playbook Add Custom Tag (Windows) step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

> **Note:** This step type extends the **Deploy Action** step for a specific package. If you add this step type using a GraphQL request instead of through Tanium Console, the step name appears as **Deploy Action** when you edit the playbook. Confirm the package ID and name for your environment, as it might differ from the example syntax.

The **Add Custom Tag (Windows)** step requires the following permissions to deploy the **Custom Tagging - Add Tags** package:

- **Interact Execute action** permission
- **Package read** permission is required on the **Core Content** content set.
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

> **Note:** The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

The **Add Custom Tag (Windows)** step deploys the **Custom Tagging - Add Tags** package to targeted endpoints, which assigns one or more custom tags to targeted endpoints.

The following mutation creates a playbook, because no ID is specified in the input, and defines a

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Deploy Action step that runs the **Custom Tagging - Add Tags** package on the targeted endpoints belonging to the **All Windows** computer group:

```
mutation exampleUpsertPlaybookAddTagWindows($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_add_tag_windows",
    "description": "Example playbook - Add Tags to Windows Machine step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_add_tag_windows_step",
        "description": "Example step 1: Add Tags to Windows Machines",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Windows"
            },
            "negated": false,
            "any": true
          }
        },
        "taskArgument": {
```

```
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1200
            },
            "completionPercentage": 1,
            "package": {
              "id": "35",
              "name": "Custom Tagging - Add Tags",
              "params": [
                "example_tag"
              ]
            },
            "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_add_tag_windows",
        "steps": [
          {
            "description": "Example step 1: Add Tags to Windows Machines",
            "name": "example_add_tag_windows_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Add a playbook Deploy Action step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

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The **Deploy Action** step requires the following permissions to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** permission on content sets determine which packages are available for selection in actions.
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.



Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

The **Deploy Action** step deploys an action that runs a package on targeted endpoints.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Deploy Action** step that runs the **Example Package** package on the targeted endpoints belonging to the **All Windows** computer group:

```
mutation exampleUpsertPlaybookDeployAction($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

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```
{
  "input": {
    "name": "example_playbook_deploy_action",
    "description": "Example playbook - Deploy action step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_deploy_action_step",
        "description": "Example step 1: Deploy example package",
        "endpointTargeting": {
          "memberOf": {
            "name": "All Windows"
          },
          "negated": false,
          "any": true
        },
                "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 12000
            },
            "completionPercentage": 1,
            "package": {
              "name": "Example package"
            },
            "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_deploy_action",
        "steps": [
          {
```

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```
            "description": "Example step 1: Deploy Example Package",
            "name": "example_deploy_action_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Add email notifications to a playbook

(mutation.upsertPlaybook (input.notificationSettings.email))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

You can configure a playbook to send email notifications to recipient email addresses based on playbook run events. For information on the available playbook run event types, see `PlaybookNotificationEventType` in the Documentation Explorer.

The following mutation creates a playbook, because no ID is specified in the input, and defines email notifications when a playbook run starts or ends:

```
mutation exampleUpsertPlaybookEmailNotification($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      contentSet {
        name
      }
      createdTime
      description
      id
      name
          notificationSettings {
            email {
                  events
                  recipients
                }
          }
      startingStep {
        id
        name
        description
      }
      steps {
        id
        description
```

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```
        name
        nextStep {
          id
          name
          taskArgument {
            __typename
          }
        }
        previousStep {
          id
          name
          taskArgument {
            __typename
          }
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_upsert_create",
    "description": "Example playbook upsert create",
    "contentSet": {
      "id": "1234"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "12345678-90ab-cdef-1234-567890abcdef",
    "steps": [
      {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_step_1",
        "description": "Example step 1: Initiation",
        "nextStepID": "22345678-90ab-cdef-1234-567890abcde2",
        "taskArgument": {
          "instruction": {
            "instruction": "# Initiate (start) this step, then confirm when complete."
          }
        }
      },
      {
        "id": "22345678-90ab-cdef-1234-567890abcde2",
        "name": "example_step_2",
```

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```
        "description": "Example step 2: Processing",
        "nextStepID": "32345678-90ab-cdef-1234-567890abcde3",
        "taskArgument": {
          "instruction": {
            "instruction": "# Work (Process) this step, then confirm when complete."
          }
        }
      },
      {
        "id": "32345678-90ab-cdef-1234-567890abcde3",
        "name": "example_step_3",
        "description": "Example step 3: Resolution",
        "nextStepID": null,
        "taskArgument": {
          "instruction": {
            "instruction": "# Finish (Resolve) this step, then confirm when complete."
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "contentSet": {
          "name": "Automate"
        },
        "createdTime": "2024-08-06T14:26:32.079536Z",
        "description": "Example playbook upsert create",
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_playbook_upsert_create",
                "notificationSettings": {
                  "email": {
                        "events": [
                          "START",
                          "END"
                        ],
                        "recipients": [
                          "host@example.com"
                        ]
          }
        }
        "startingStep": {
          "id": "12345678-90ab-cdef-1234-567890abcdef",
          "name": "example_step_1",
          "description": "Example step 1: Initiation"
        },
        "steps": [
          {
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "description": "Example step 1: Initiation",
            "name": "example_step_1",
            "nextStep": {
              "id": "22345678-90ab-cdef-1234-567890abcde2",
              "name": "example_step_2",
              "taskArgument": {
                "__typename": "AutomateTaskArgumentInstruction"
```

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```
            }
          },
          "previousStep": null
        },
        {
          "id": "22345678-90ab-cdef-1234-567890abcde2",
          "description": "Example step 2: Processing",
          "name": "example_step_2",
          "nextStep": {
            "id": "32345678-90ab-cdef-1234-567890abcde3",
            "name": "example_step_3",
            "taskArgument": {
              "__typename": "AutomateTaskArgumentInstruction"
            }
          },
          "previousStep": {
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "name": "example_step_1",
            "taskArgument": {
              "__typename": "AutomateTaskArgumentInstruction"
            }
          }
        },
        {
          "id": "32345678-90ab-cdef-1234-567890abcde3",
          "description": "Example step 3: Resolution",
          "name": "example_step_3",
          "nextStep": null,
          "previousStep": {
            "id": "22345678-90ab-cdef-1234-567890abcde2",
            "name": "example_step_2",
            "taskArgument": {
              "__typename": "AutomateTaskArgumentInstruction"
            }
          }
        }
      ]
    },
    "isNewRecord": true,
    "error": null
  }
 }
}
```


Add a playbook Linux Quarantine step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

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Note: This step type extends the **Deploy Action** step for a specific package. If you add this step type using a GraphQL request instead of through Tanium Console, the step name appears as **Deploy Action** when you edit the playbook. Confirm the package ID and name for your environment, as it might differ from the example syntax.

Important: You must have the **Content Administrator** reserved role for Tanium Console. For more information, see Tanium Core Platform User Guide: Managing Roles.

The **Linux Quarantine** step requires the following permissions to deploy the **Threat Response - Quarantine Endpoint Template [Linux]** package:

- **Interact Execute action** permission
- **Package read** permission is required on the **Incident Response** content set.
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

For more information, see Tanium Console User Guide: Action management permissions.

The **Linux Quarantine** step deploys the **Threat Response - Quarantine Endpoint Template [Linux]** package to targeted endpoints, which isolates a targeted endpoint from the network. For information about quarantining endpoints, see Tanium Threat Response User Guide: Quarantining endpoints.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Deploy Action** step that runs the **Threat Response - Quarantine Endpoint Template [Linux]** package on the targeted endpoints belonging to the **All Linux** computer group:

```
mutation exampleUpsertPlaybookQuarantineLinux($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
```

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```
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_quarantine_linux",
    "description": "Example playbook - Quarantine Linux step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_quarantine_linux_step",
        "description": "Example step 1: Quarantine Linux",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Linux"
            },
            "negated": false,
            "any": true
          }
        },
                "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1800
            },
            "completionPercentage": 1,
            "package": {
              "name": "Threat Response - Quarantine Endpoint Template [Linux]",
              "params": [
                "1",
                "1",
                "1",
                "1",
                "1",
```

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```
                "1",
                "example notification",
                "IN:UDP:10.0.0.21:32:161\nOUT:UDP:10.0.0.21:32:162",
                "192.0.2.10",
                "192.0.2.20",
                "1",
                ""
              ]
            },
            "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_quarantine_linux",
        "steps": [
          {
            "description": "Example step 1: Quarantine Linux",
            "name": "example_quarantine_linux_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Add a playbook Manual Instruction step

(mutation.upsertPlaybook (input.steps), mutation.playbookRunPerformOperation)

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

The **Manual Instruction** step displays an instruction, generally in Markdown format, to the Tanium operator. The Tanium operator must confirm the completion to allow the playbook to proceed to the next step.

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The following mutation creates a playbook, because no ID is specified in the input, and defines a **Manual Instruction** step, which shows information to a Tanium operator:

```
mutation exampleUpsertPlaybookManualInstruction($input: PlaybookUpsertInput!) {
  playbookUpsert(
    input: $input
  ) {
    playbook {
      createdTime
      description
      id
      name
      revision
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_manual_instruction",
    "description": "Example playbook - Manual Instruction step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": ["START", "END"],
        "recipients": ["host@example.com"]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_manual_instruction_step",
        "description": "Example step 1: External process",
        "taskArgument": {
          "instruction": {
            "instruction": "# Check the external system output. Confirm this step when
complete."
          }
        }
      }
    ]
  }
}
```

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Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "createdTime": "2023-08-21T13:15:58.764932Z",
        "description": "Example playbook - Manual Instruction step",
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook",
        "revision": 1,
        "steps": [
          {
            "description": "Example step 1: Initiation",
            "name": "example_step_1",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentInstruction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

For a running playbook with a **Manual Instruction** step at index `0`, the following mutation issues the step confirmation.



Note: The `PlaybookRunOperation` object enumerates available playbook run operations.

```
mutation exampleConfirmPlaybookRunStep($input: PlaybookRunPerformOperationInput!) {
  playbookRunPerformOperation(
    input: $input
  ) {
    playbookRun {
      createdTime
      endTime
      events {
        createdTime
        initiator {
          persona {
            id
          }
          user {
            id
          }
        }
        name
      }
      id
      playbook {
        id
      }
      runAs {
        persona {
```

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```
          id
        }
        user {
          id
        }
      }
      scheduleStartTime
      startTime
      status
      steps {
        confirmationResult {
          comment
          completedUser {
            id
          }
          completionTime
        }
        endTime
        playbookStep {
          description
          name
        }
        startTime
        status
        error
      }
    }
  }
}
```

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

```
{
  "input": {
    "id": "fedcba09-8765-4321-fedc-ba0987654321",
    "operation": "CONFIRM_STEP",
    "parameters": {
      "confirmStep": {
        "runStepIndex": 0,
        "comment": "# Example confirmation of Manual Instruction step."
      }
    }
  }
}
```

Example response:

```
{
  "data": {
    "playbookRunPerformOperation": {
      "playbookRun": {
        "createdTime": "2023-08-21T13:48:30.173539Z",
        "endTime": null,
        "events": [
          {
            "createdTime": "2023-08-21T06:48:30.1720982-07:00",
            "initiator": {
              "persona": null,
              "user": {
                "id": "1"
              }
```

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```
            },
            "name": "CREATE"
          },
          {
            "createdTime": "2023-08-21T13:48:30.1800994Z",
            "initiator": null,
            "name": "START"
          },
          {
            "createdTime": "2023-08-21T13:48:30.2041051Z",
            "initiator": null,
            "name": "WAIT"
          },
          {
            "createdTime": "2023-08-21T06:51:37.6948538-07:00",
            "initiator": {
              "persona": null,
              "user": {
                "id": "1"
              }
            },
            "name": "CONFIRM"
          }
        ],
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "playbook": {
          "id": "12345678-90ab-cdef-1234-567890abcdef"
        },
        "runAs": {
          "persona": null,
          "user": {
            "id": "1"
          }
        },
        "scheduleStartTime": null,
        "startTime": "2023-08-21T13:48:30.180099Z",
        "status": "IN_PROGRESS",
        "steps": [
          {
            "confirmationResult": {
              "comment": "# Example confirmation of Manual Instruction step.",
              "completedUser": {
                "id": "1"
              },
              "completionTime": "2023-08-21T06:51:37.6948538-07:00"
            },
            "endTime": null,
            "playbookStep": {
              "description": "Example step 1: Initiation",
              "name": "example_step_1"
            },
            "startTime": "2023-08-21T13:48:30.2041051Z",
            "status": "IN_PROGRESS",
            "error": ""
          }
        ]
      }
    }
  }
}
```


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Add a playbook Reboot Non-Windows Machine step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

> **Note:** This step type extends the **Deploy Action** step for a specific package. If you add this step type through a GraphQL request instead of through Tanium Console, the step name appears as **Deploy Action** when you edit the playbook. Confirm the package ID and name for your environment, as it might differ from the example syntax.

The **Reboot Non-Windows Machine** step requires the following permissions to deploy the **Reboot Non-Windows Machine** package:

- **Interact Execute action** permission
- **Package read** permission on the **Core Content** content set.
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

> **Note:** The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

The **Reboot Non-Windows Machine** step deploys the **Reboot Non-Windows Machine** package to targeted endpoints, which reboots the endpoints.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Deploy Action** step that runs the **Reboot Non-Windows Machine** package on the targeted endpoints

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belonging to the **All Linux** computer group:

```
mutation exampleUpsertPlaybookRebootNonWindows($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_reboot_non_windows",
    "description": "Example playbook - Reboot Non-Windows Machine step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_reboot_non_windows_step",
        "description": "Example step 1: Reboot Non-Windows Machines",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Linux"
            },
            "negated": false,
            "any": true
          }
        },
                "taskArgument": {
          "deployAction": {
```

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```
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1200
            },
            "completionPercentage": 1,
            "package": {
              "id": "47",
              "name": "Reboot Windows Machine",
              "params": [
                "REBOOT",
                "30"
              ]
            },
            "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_reboot_non_windows",
        "steps": [
          {
            "description": "Example step 1: Reboot Non-Windows Machines",
            "name": "example_reboot_non_windows_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Add a playbook Reboot Windows Machine step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

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Note: This step type extends the **Deploy Action** step for a specific package. If you add this step type using a GraphQL request instead of through Tanium Console, the step name appears as **Deploy Action** when you edit the playbook. Confirm the package ID and name for your environment, as it might differ from the example syntax.

The **Reboot Windows Machine** step requires the following permissions to deploy the **Reboot Windows Machine** package:

- **Interact Execute action** permission
- **Package read** permission on the **Core Content** content set.
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

The **Reboot Windows Machine** step deploys the **Reboot Windows Machine** package to targeted endpoints, which reboots the endpoints.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Deploy Action** step that runs the **Reboot Windows Machine** package on the targeted endpoints belonging to the **All Windows** computer group:

```
mutation exampleUpsertPlaybookRebootWindows($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
```

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```
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_reboot_windows",
    "description": "Example playbook - Reboot Windows Machine step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_reboot_windows_step",
        "description": "Example step 1: Reboot Windows Machines",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Windows"
            },
            "negated": false,
            "any": true
          }
        },
                "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1200
            },
            "completionPercentage": 1,
            "package": {
              "id": "47",
              "name": "Reboot Windows Machine",
              "params": [
                "REBOOT",
                "yes",
                "30"
              ]
            },
```

```
            "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_reboot_windows",
        "steps": [
          {
            "description": "Example step 1: Reboot Windows Machines",
            "name": "example_reboot_windows_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Add a playbook Remove Linux Quarantine step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

Note: This step type extends the **Deploy Action** step for a specific package. If you add this step type using a GraphQL request instead of through Tanium Console, the step name appears as **Deploy Action** when you edit the playbook. Confirm the package ID and name for your environment, as it might differ from the example syntax.

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Important: You must have the **Content Administrator** reserved role for Tanium Console. For more information, see Tanium Core Platform User Guide: Managing Roles.

The **Remove Linux Quarantine** step requires the following permissions to deploy the **Threat Response - Unquarantine Endpoint [Linux]** package:

- **Interact Execute action** permission
- **Package read** permission is required on the **Incident Response** content set.
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

For more information, see Tanium Console User Guide: Action management permissions.

The **Remove Linux Quarantine** step deploys the **Threat Response - Unquarantine Endpoint [Linux]** package to targeted endpoints, which restores network connectivity to a targeted quarantined endpoint. For information about quarantining endpoints, see Tanium Threat Response User Guide: Quarantining endpoints.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Deploy Action** step that runs the **Threat Response - Unquarantine Endpoint [Linux]** package on the targeted endpoints that belong to the **All Linux** computer group:

```
mutation exampleUpsertPlaybookRemoveQuarantineLinux($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_remove_quarantine_linux",
    "description": "Example playbook - Remove Quarantine Linux step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_remove_quarantine_linux_step",
        "description": "Example step 1: Remove Quarantine Linux",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Linux"
            },
            "negated": false,
            "any": true
          }
        },
                "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1800
            },
            "completionPercentage": 1,
            "package": {
              "name": "Threat Response - Unquarantine Endpoint [Linux]"
            },
            "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
```

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```
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_remove_quarantine_linux",
        "steps": [
          {
            "description": "Example step 1: Remove Quarantine Linux",
            "name": "example_remove_quarantine_linux_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Add a playbook Remove Windows Quarantine step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

Note: This step type extends the **Deploy Action** step for a specific package. If you add this step type using a GraphQL request instead of through Tanium Console, the step name appears as **Deploy Action** when you edit the playbook. Confirm the package ID and name for your environment, as it might differ from the example syntax.

Important: You must have the **Content Administrator** reserved role for Tanium Console. For more information, see Tanium Core Platform User Guide: Managing Roles.

The **Remove Windows Quarantine** step requires the following permissions to deploy the **Threat Response - Unquarantine Endpoint [Windows]** package:

- **Interact Execute action** permission
- **Package read** permission is required on the **Incident Response** content set.

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- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

For more information, see Tanium Console User Guide: Action management permissions.

The **Remove Windows Quarantine** step deploys the **Threat Response - Unquarantine Endpoint [Windows]** package to targeted endpoints, which restores network connectivity to a targeted quarantined endpoint. For information about quarantining endpoints, see Tanium Threat Response User Guide: Quarantining endpoints.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Deploy Action** step that runs the **Threat Response - Unquarantine Endpoint [Windows]** package on the targeted endpoints belonging to the **All Windows** computer group:

```
mutation exampleUpsertPlaybookRemoveQuarantineWindows($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_remove_quarantine_windows",
    "description": "Example playbook - Remove Quarantine Windows step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
```

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```
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_remove_quarantine_windows_step",
        "description": "Example step 1: Remove Quarantine Windows",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Windows"
            },
            "negated": false,
            "any": true
          }
        },
                "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1800
            },
            "completionPercentage": 1,
            "package": {
              "name": "Threat Response - Unquarantine Endpoint [Windows]"
            },
            "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_remove_quarantine_windows",
        "steps": [
          {
            "description": "Example step 1: Remove Quarantine Windows",
            "name": "example_remove_quarantine_windows_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
```

```
  }
}
```

Add a playbook Require User Confirmation step

(mutation.upsertPlaybook (input.steps), mutation.playbookRunPerformOperation)

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

The **Require User Confirmation** step displays an instruction, generally in Markdown format, to the Tanium operator. This step requires a Tanium operator to confirm that the playbook can proceed to the next step.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Require User Confirmation** step, which displays information to a Tanium operator and requires user confirmation before continuing to the next playbook run step:

```
mutation exampleUpsertPlaybookUserConfirmation($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      createdTime
      description
      id
      name
      revision
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_require_user_confirmation",
    "description": "Example playbook - Require User Confirmation step",
    "contentSet": {
```

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```
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": ["START", "END"],
        "recipients": ["host@example.com"]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
            "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_require_user_confirmation_step",
        "description": "Example step 1: Verification",
        "taskArgument": {
          "confirmation": {
            "instruction": "# Verify that the system is running, then confirm when complete."
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "createdTime": "2023-08-21T13:15:58.764932Z",
        "description": "Example playbook - Require User Confirmation step",
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook",
        "revision": 1,
        "steps": [
          {
            "description": "Example step 1: Initiation",
            "name": "example_step_1",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentConfirmation"
            }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

For a running playbook with a Require User Confirmation step at index `0`, the following mutation issues the step confirmation.

Note: The `PlaybookRunOperation` object enumerates available playbook run operations.

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```
mutation exampleConfirmPlaybookRunStep($input: PlaybookRunPerformOperationInput!) {
  playbookRunPerformOperation(
    input: $input
  ) {
    playbookRun {
      createdTime
      endTime
      events {
        createdTime
        initiator {
          persona {
            id
          }
          user {
            id
          }
        }
        name
      }
      id
      playbook {
        id
      }
      runAs {
        persona {
          id
        }
        user {
          id
        }
      }
      scheduleStartTime
      startTime
      status
      steps {
        confirmationResult {
          comment
          completedUser {
            id
          }
          completionTime
        }
        endTime
        playbookStep {
          description
          name
        }
        startTime
        status
        error
      }
    }
  }
}
```

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

```
{
  "input": {
    "id": "dfe531d2-634c-4143-b80b-2e1e3987f6e8",
    "operation": "CONFIRM_STEP",
    "parameters": {
```

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```
      "confirmStep": {
        "runStepIndex": 0,
        "comment": "# Example confirmation of Require User Confirmation step."
      }
    }
  }
}
```

Example response:

```
{
  "data": {
    "playbookRunPerformOperation": {
      "playbookRun": {
        "createdTime": "2023-08-21T13:29:18.306899Z",
        "endTime": null,
        "events": [
          {
            "createdTime": "2023-08-21T06:29:18.3059042-07:00",
            "initiator": {
              "persona": null,
              "user": {
                "id": "1"
              }
            },
            "name": "CREATE"
          },
          {
            "createdTime": "2023-08-21T13:29:18.3089013Z",
            "initiator": null,
            "name": "START"
          },
          {
            "createdTime": "2023-08-21T13:29:18.332902Z",
            "initiator": null,
            "name": "WAIT"
          },
          {
            "createdTime": "2023-08-21T06:31:25.3657962-07:00",
            "initiator": {
              "persona": null,
              "user": {
                "id": "1"
              }
            },
            "name": "CONFIRM"
          }
        ],
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "playbook": {
          "id": "12345678-90ab-cdef-1234-567890abcdef"
        },
        "runAs": {
          "persona": null,
          "user": {
            "id": "1"
          }
        },
        "scheduleStartTime": null,
        "startTime": "2023-08-21T13:29:18.308901Z",
        "status": "IN_PROGRESS",
        "steps": [
```

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```
          {
            "confirmationResult": {
              "comment": "# Example confirmation of Require User Confirmation step.",
              "completedUser": {
                "id": "1"
              },
              "completionTime": "2023-08-21T06:31:25.3657962-07:00"
            },
            "endTime": null,
            "playbookStep": {
              "description": "Example step 1: Initiation",
              "name": "example_step_1"
            },
            "startTime": "2023-08-21T13:29:18.332902Z",
            "status": "IN_PROGRESS",
            "error": ""
          }
        ]
      }
    }
  }
}
```


Add steps that inherit endpoint targeting

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

When configuring steps that target endpoints, note the following:

- Targeting inheritance relies upon referencing a prior step ID. When creating a playbook, manually assign a step ID for reference. Ensure that the step ID is unique, to avoid step ID reference collision issues when resolving a referenced step ID. Playbook steps without a user-defined ID are assigned a GUID in the format `12345678-90ab-cdef-1234-567890abcdef`.
- Not all steps target endpoints. For example, the **Wait** step waits for the configured amount of time before the playbook run proceeds to the next step, without targeting endpoints.
- You cannot inherit targeting from a **Verify Condition** step.
- If a step targets endpoints, such as `(input.steps.endpointTargeting)`, you must define one, and only one, of `customTargeting`, `previousStepTargeting`, or `previousStepCompletedTargeting`.

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    - `customTargeting` supports targeting endpoints based on computer group membership, sensor evaluation, or a combination of both. For more information on supported syntax, see `ComputerGroupFilter` in the Documentation Explorer.

    - `previousStepTargeting` targets the same endpoints as a prior targeting step index value in the playbook step array.

    - `previousStepCompletedTargeting` targets the endpoints that completed the prior targeting step in the playbook step array.

- If the first step in a playbook targets endpoints, you must define `customTargeting`. Because no steps precede the first step, you cannot inherit targeting from prior steps.

- For any step in a playbook that targets endpoints after the first step, you can define `customTargeting` for the step, or inherit endpoint targeting using either `previousStepTargeting` or `previousStepCompletedTargeting`, referencing a prior step index.

- If you inherit endpoint targeting with either `previousStepTargeting` or `previousStepCompletedTargeting`, and the referenced step index does not target endpoints, the evaluation traverses backwards from the referenced step to find a step that targets endpoints, then uses that step targeting. If no steps in this evaluation target endpoints, this results in an error.

- Depending on the step type, additional endpoint filtering might be required to narrow the targeted endpoints, regardless of endpoint targeting method.

The following mutation creates a playbook, because no ID is specified in the input, and defines three steps:

- step ID `12345678-90ab-cdef-1234-567890abcdef`: a **Deploy Action** step that uses the **Custom Tagging - Add Tags** to apply the `example-tag` tag to endpoints in the `All Windows` computer group

- step ID `02345678-90ab-cdef-1234-567890abcde0`: a **Deploy Action** step that inherits endpoint targeting from step ID `12345678-90ab-cdef-1234-567890abcdef` and defines the `All Windows 10` computer group as an additional filter

- step ID `92345678-90ab-cdef-1234-567890abcde9`: a **Verify Condition** step that

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sets a `successPercentage` value of `1` (100%) of all endpoints that completed step ID `02345678-90ab-cdef-1234-567890abcde0`

```
mutation exampleUpsertPlaybookStepInheritance($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      createdTime
      description
      id
      name
      revision
      steps {
        id
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_target_inheritance",
    "description": "Example playbook - Step target inheritance",
    "contentSet": {
      "id": "1234"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "12345678-90ab-cdef-1234-567890abcdef",
    "steps": [
      {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_add_tag_windows_step",
        "description": "Example step 1: Add Tags to Windows Machines",
        "endpointTargeting": {
                  "customTargeting": {
            "memberOf": {
              "name": "All Windows"
            },
            "negated": false,
```

```
          "any": true
        }
              },
              "nextStepID": "02345678-90ab-cdef-1234-567890abcde0",
      "taskArgument": {
        "deployAction": {
          "actionGroup": {
            "id": "3",
            "name": "Default"
          },
          "actionDuration": {
            "seconds": 12000
          },
          "completionPercentage": 1,
          "package": {
            "id": "35",
            "name": "Custom Tagging - Add Tags",
            "params": [
              "example_tag"
            ]
          }
        }
      }
    },
    {
      "id": "02345678-90ab-cdef-1234-567890abcde0",
      "name": "example_deploy_action_step",
      "description": "Example step 2: Deploy action to Windows 10",
      "endpointTargeting": {
        "previousStepTargetingID": "12345678-90ab-cdef-1234-567890abcdef"
      },
              "nextStepID": "92345678-90ab-cdef-1234-567890abcde9",
      "taskArgument": {
        "deployAction": {
          "actionGroup": {
            "name": "All Windows 10"
          },
          "completionPercentage": 1,
          "package": {
            "name": "Custom Tagging - Add Tags"
          }
        }
      }
    },
    {
      "id": "92345678-90ab-cdef-1234-567890abcde9",
      "name": "example_verify_condition_step",
      "description": "Example step 3: Check for virtual Windows utility run",
      "endpointTargeting": {
        "previousStepCompletedTargetingID": "02345678-90ab-cdef-1234-567890abcde0"
      },
      "taskArgument": {
        "verifyCondition": {
          "endpointFilter": {
            "sensor": {
              "name": "Is Virtual"
            },
            "op": "EQ",
            "value": "true",
            "negated": false,
            "any": false
          },
          "successPercentage": 1
        }
```

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```
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "createdTime": "2023-09-28T18:29:34.408097Z",
        "description": "Example playbook - Step target inheritance",
        "id": "52345678-90ab-cdef-1234-567890abcde5",
        "name": "example_playbook_target_inheritance",
        "revision": 1,
        "steps": [
          {
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "description": "Example step 1: Add Tags to Windows Machines",
            "name": "example_add_tag_windows_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          },
          {
            "id": "02345678-90ab-cdef-1234-567890abcde0",
            "description": "Example step 2: Deploy action to virtual Windows 10",
            "name": "example_deploy_action_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          },
          {
            "id": "92345678-90ab-cdef-1234-567890abcde9",
            "description": "Example step 3: Check for virtual Windows utility run",
            "name": "example_verify_condition_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentVerifyCondition"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

The following mutation creates a playbook, because no ID is specified in the input, and defines the following steps:

- step one: a **Deploy Action** step that deploys the **Custom Tagging - Add Tags** package to all endpoints in the `All Windows` computer group and sets a `completionPercentage` value of `1.0` (100%) of endpoints

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- step two: a **Verify Condition** step that checks that all endpoints in the `All Windows` computer group are not virtual
- step three: a **Require User Confirmation** step that does not target endpoints
- step four: a **Wait** step that does not target endpoints
- step five: a **Require User Confirmation** step that does not target endpoints
- step six: a **Deploy Action** step that sets a `successPercentage` value of `1.0` (100%) of all endpoints that completed step one

The endpoint targeting for step six references the endpoint targeting for step one, and does not consider any endpoint targeting or lack of endpoint targeting in steps two, three, four, or five.

```
mutation exampleUpsertPlaybookStepInheritanceSkip($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      createdTime
      description
      id
      name
      revision
      steps {
        id
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "id": "69e03694-425a-46ef-ba87-7ffd3fcf701d",
    "name": "example_playbook_target_inheritance",
    "description": "Example playbook - Step target inheritance",
    "contentSet": {
      "id": "2313"
    },
    "notificationSettings": {
      "email": {
        "events": [
```

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```
        "START",
        "END"
      ],
      "recipients": [
        "host@example.com"
      ]
    }
  },
  "startingStepID": "12345678-90ab-cdef-1234-567890abcdef",
  "steps": [
    {
      "id": "12345678-90ab-cdef-1234-567890abcdef",
      "name": "example_add_tag_windows_step",
      "description": "Example step 1: Add Tags to Windows Machines",
      "endpointTargeting": {
                "customTargeting": {
          "memberOf": {
            "name": "All Windows"
          },
          "negated": false,
          "any": true
        }
              },
      "nextStepID": "22345678-90ab-cdef-1234-567890abcde2",
      "taskArgument": {
        "deployAction": {
          "actionGroup": {
            "id": "3",
            "name": "Default"
          },
          "actionDuration": {
            "seconds": 12000
          },
          "completionPercentage": 1,
          "package": {
            "id": "35",
            "name": "Custom Tagging - Add Tags",
            "params": [
              "example_tag"
            ]
          }
        }
      }
    },
    {
      "id": "22345678-90ab-cdef-1234-567890abcde2",
      "name": "example_verify_condition_step",
      "description": "Example step 2: Check for physical Windows",
      "endpointTargeting": {
                "customTargeting": {
          "memberOf": {
            "name": "All Windows"
          },
          "negated": false,
          "any": true
        }
              },
      "nextStepID": "32345678-90ab-cdef-1234-567890abcde3",
      "taskArgument": {
        "verifyCondition": {
          "endpointFilter": {
            "sensor": {
              "name": "Is Virtual"
            },
```

```
              "op": "EQ",
              "value": "false",
              "negated": false,
              "any": false
            },
            "successPercentage": 1
          }
        }
      },
      {
        "id": "32345678-90ab-cdef-1234-567890abcde3",
        "name": "example_confirmation_step",
        "description": "Example step 3: Confirm Windows workstations online",
        "nextStepID": "42345678-90ab-cdef-1234-567890abcde4",
        "taskArgument": {
          "confirmation": {
            "instruction": "Verify that critical Windows workstations are online, then
confirm this step."
          }
        }
      },
      {
        "id": "42345678-90ab-cdef-1234-567890abcde4",
        "name": "example_wait_step",
        "description": "Example step 4: Wait twelve hours for background processes",
        "nextStepID": "52345678-90ab-cdef-1234-567890abcde5",
        "taskArgument": {
          "wait": {
            "duration": {
              "seconds": 43200
            }
          }
        }
      },
      {
        "id": "52345678-90ab-cdef-1234-567890abcde5",
        "name": "additional_confirmation_step",
        "description": "Example step 5: Confirm background processes did not error",
        "nextStepID": "62345678-90ab-cdef-1234-567890abcde6",
        "taskArgument": {
          "confirmation": {
            "instruction": "Verify that overnight processes ran in the
C:\\logs\\overnight\\[date]-[time]-overnight-[index-value].log files. If any errors in the
log, contact network admin on call. Otherwise, confirm this step."
          }
        }
      },
      {
        "id": "62345678-90ab-cdef-1234-567890abcde6",
        "name": "example_deploy_action_step",
        "description": "Example step 6: Deploy action to copy log info on important physical
Windows workstations",
        "endpointTargeting": {
          "previousStepTargetingID": "12345678-90ab-cdef-1234-567890abcdef"
        },
        "nextStepID": null,
        "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "name": "Critical Hardware"
            },
            "completionPercentage": 1,
            "package": {
              "name": "Copy Log Info"
```

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```
            }
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "createdTime": "2024-05-06T19:48:33.601759Z",
        "description": "Example playbook - Step target inheritance",
        "id": "f635b09c-93e9-44e5-8094-6dc7c5a420ac",
        "name": "example_playbook_target_inheritance",
        "revision": 1,
        "steps": [
          {
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "description": "Example step 1: Add Tags to Windows Machines",
            "name": "example_add_tag_windows_step",
            "taskArgument": {
              "__typename": "AutomateTaskArgumentDeployAction"
                        }
          },
          {
            "id": "22345678-90ab-cdef-1234-567890abcde2",
            "description": "Example step 2: Check for physical Windows",
            "name": "example_verify_condition_step",
            "taskArgument": {
              "__typename": "AutomateTaskArgumentVerifyCondition"
                        }
          },
          {
            "id": "32345678-90ab-cdef-1234-567890abcde3",
            "description": "Example step 3: Confirm Windows workstations online",
            "name": "example_confirmation_step",
                        "taskArgument": {
              "__typename": "AutomateTaskArgumentConfirmation"
                        }
          },
          {
            "id": "42345678-90ab-cdef-1234-567890abcde4",
            "description": "Example step 4: Wait twelve hours for background processes",
            "name": "example_wait_step",
                        "taskArgument": {
              "__typename": "AutomateTaskArgumentWait"
                        }
          },
          {
            "id": "52345678-90ab-cdef-1234-567890abcde5",
            "description": "Example step 5: Confirm background processes did not error",
            "name": "additional_confirmation_step",
                        "taskArgument": {
              "__typename": "AutomateTaskArgumentConfirmation"
                        }
          },
          {
            "id": "62345678-90ab-cdef-1234-567890abcde6",
```

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```
            "description": "Example step 6: Deploy action to copy log info on important
physical Windows workstations",
            "name": "example_deploy_action_step",
                        "taskArgument": {
              "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Add a playbook Verify Condition step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

The **Verify Condition** step evaluates the percentage of targeted endpoints that answered a Tanium question, compared to the total number of endpoints managed using Tanium Client. The step is considered complete when 95% of endpoints have responded, or after ten minutes elapse (the question expiration interval). If the percentage meets or exceeds the defined `successPercent` value, the step completes and the playbook run moves to the next step. Otherwise, the playbook run ends.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Verify Condition** step that sets a `successPercentage` value of `0.501` (50.1%) of endpoints in the `All Windows Machines` computer group that are not virtual:

```
mutation exampleUpsertPlaybookVerifyCondition($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      createdTime
      description
      id
      name
      revision
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
```

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```
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_verify_condition",
    "description": "Example playbook - Verify Condition step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_verify_condition_step",
        "description": "Example step 1: Check for virtual Windows",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Windows"
            },
            "negated": false,
            "any": true
          }
        },
                "taskArgument": {
          "verifyCondition": {
            "endpointFilter": {
              "sensor": {
                "name": "Is Virtual"
              },
              "op": "EQ",
              "value": "true"
            },
            "successPercentage": 0.501
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "createdTime": "2023-08-21T13:15:58.764932Z",
        "description": "Example playbook - Verify Condition step",
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_verify_condition",
        "revision": 1,
        "steps": [
          {
            "description": "Example step 1: Check for virtual Windows",
            "name": "example_verify_condition_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentVerifyCondition"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Add a playbook Wait step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

The **Wait** step waits for a configured amount of time, then moves to the next step in the playbook run.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Wait** step, which waits the specified duration of 60 seconds before continuing to the next playbook run step:

```
mutation exampleUpsertPlaybookWait($input: PlaybookUpsertInput!) {
  playbookUpsert(
    input: $input
  ) {
    playbook {
      createdTime
      description
      id
      name
      revision
```

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```
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_wait_step",
    "description": "Example playbook - Wait step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_wait_step",
        "description": "Example step 1: Wait 1 minute",
        "taskArgument": {
          "wait": {
            "duration": {
              "nanoseconds": 0,
              "seconds": 60
            }
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
```

```
      "playbook": {
        "createdTime": "2024-08-06T17:16:21.467859Z",
        "description": "Example playbook - Wait step",
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_wait_step",
        "revision": 2,
        "steps": [
          {
            "description": "Example step 1: Wait 1 minute",
            "name": "example_wait_step",
            "taskArgument": {
              "__typename": "AutomateTaskArgumentWait"
            }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```


Add a playbook Windows Quarantine step

(mutation.upsertPlaybook (input.steps))

About this task

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

Note: This step type extends the **Deploy Action** step for a specific package. If you add this step type using a GraphQL request instead of through Tanium Console, the step name appears as **Deploy Action** when you edit the playbook. Confirm the package ID and name for your environment, as it might differ from the example syntax.

Important: You must have the **Content Administrator** reserved role for Tanium Console. For more information, see Tanium Core Platform User Guide: Managing Roles.

The **Windows Quarantine** step requires the following permissions to deploy the **Threat Response - Quarantine Endpoint Template [Windows]** package:

- **Interact Execute action** permission

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- **Package read** permission is required on the **Incident Response** content set.
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

For more information, see Tanium Console User Guide: Action management permissions.

The **Windows Quarantine** step deploys the **Threat Response - Quarantine Endpoint Template [Windows]** package to targeted endpoints, which isolates a targeted endpoint from the network. For information about how to quarantine endpoints, see Tanium Threat Response User Guide: Quarantining endpoints.

The following mutation creates a playbook, because no ID is specified in the input, and defines a **Deploy Action** step that runs the **Threat Response - Quarantine Endpoint Template [Windows]** package on the targeted endpoints belonging to the **All Windows** computer group:

```
mutation exampleUpsertPlaybookQuarantineWindows($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_quarantine_windows",
    "description": "Example playbook - Quarantine Windows step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
```

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```
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_quarantine_windows_step",
        "description": "Example step 1: Quarantine Windows",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Windows"
            },
            "negated": false,
            "any": true
          }
        },
                "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1800
            },
            "completionPercentage": 1,
            "package": {
              "name": "Threat Response - Quarantine Endpoint Template [Windows]",
              "params": [
                "1",
                "1",
                "1",
                "1",
                "1",
                "1",
                "example notification",
                "IN:UDP:10.0.0.21:32:161\nOUT:UDP:10.0.0.21:32:162",
                "192.0.2.10",
                "192.0.2.20",
                "0",
                ""
              ]
            },
            "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
```

```
    "playbookUpsert": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_quarantine_windows",
        "steps": [
          {
            "description": "Example step 1: Quarantine Windows",
            "name": "example_quarantine_windows_step",
                        "taskArgument": {
                          "__typename": "AutomateTaskArgumentDeployAction"
                        }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Create a playbook run from a playbook

(mutation.playbookStart)

About this task

The `playbookStart` mutation requires Automate 1.3 or later and the **Automate Playbook execute** permission on the content set to which a playbook belongs to start a playbook run.

The following mutation creates a playbook run from a playbook that matches the ID.

```
mutation exampleStartPlaybook($id: ID!) {
  playbookStart(input: {id: $id}) {
    playbookRun {
      createdTime
      endTime
      events {
        createdTime
        initiator {
          user {
            displayName
            username
          }
          persona {
            id
          }
        }
        name
      }
      id
      playbook {
        createdTime
        description
        id
        name
        revision
        steps {
```

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```
          description
          name
        }
        updatedTime
      }
      runAs {
        persona {
          id
        }
        user {
          id
        }
      }
      scheduleStartTime
      startTime
      status
      steps {
        playbookStep {
          description
          name
        }
        status
        error
      }
    }
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef"
}
```

Example response:

```
{
  "data": {
    "playbookStart": {
      "playbookRun": {
        "createdTime": "2023-08-18T19:47:44.041634Z",
        "endTime": null,
        "events": [
          {
            "createdTime": "2023-08-18T12:47:44.0394017-07:00",
            "initiator": {
              "user": {
                "displayName": null,
                "username": "Administrator"
              },
              "persona": null
            },
            "name": "CREATE"
          }
        ],
        "id": "618903ae-a337-40cd-849c-66cb471f5768",
```

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```
        "playbook": {
          "createdTime": "2023-08-18T19:23:34.008989Z",
          "description": "Example playbook update",
          "id": "12345678-90ab-cdef-1234-567890abcdef",
          "name": "example_playbook_update",
          "revision": 2,
          "steps": [
            {
              "description": "Example step 1 update: Initiation",
              "name": "example_step_1"
            },
            {
              "description": "Example step 2 update: Processing",
              "name": "example_step_2"
            },
            {
              "description": "Example step 3 update: Resolution",
              "name": "example_step_3"
            }
          ],
          "updatedTime": "2023-08-18T19:38:52.458956Z"
        },
        "runAs": {
          "persona": null,
          "user": {
            "id": "1"
          }
        },
        "scheduleStartTime": null,
        "startTime": null,
        "status": "NOT_STARTED",
        "steps": [
          {
            "playbookStep": {
              "description": "Example step 1 update: Initiation",
              "name": "example_step_1"
            },
            "status": "NOT_STARTED",
            "error": ""
          },
          {
            "playbookStep": {
              "description": "Example step 2 update: Processing",
              "name": "example_step_2"
            },
            "status": "NOT_STARTED",
            "error": ""
          },
          {
            "playbookStep": {
              "description": "Example step 3 update: Resolution",
              "name": "example_step_3"
            },
            "status": "NOT_STARTED",
            "error": ""
          }
        ]
      },
      "error": null
    }
  }
}
```


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Get a playbook by ID and version

(query.playbook)

About this task

The `playbook` query requires Automate 1.3 or later and the **Automate Playbook read** permission on the content set to which a playbook version belongs to retrieve the playbook.

The following query retrieves a playbook based on the ID and playbook version.

```
query exampleGetPlaybook($id: ID!, $revision: Int) {
  playbook(ref: {id: $id, revision: $revision}) {
    createdTime
    description
    id
    name
    notificationSettings {
      email {
        events
        recipients
      }
    }
    revision
    startingStep {
      id
      name
      description
    }
    steps {
      id
      description
      name
      taskArgument {
        __typename
      }
    }
    updatedTime
  }
}
```

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

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef",
  "revision": 1
}
```

Example response:

```
{
  "data": {
    "playbook": {
      "createdTime": "2023-08-18T15:53:41.091488Z",
      "description": "example description",
```

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```
      "id": "12345678-90ab-cdef-1234-567890abcdef",
      "name": "Example playbook",
      "notificationSettings": {
        "email": {
          "events": [
            "START",
            "COMPLETE",
            "END",
            "ERROR",
            "WAIT"
          ],
          "recipients": [
            "username@example.com",
            "username_2@example.com"
          ]
        }
      },
      "revision": 1,
      "startingStep": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "Require User Confirmation",
        "description": "example description"
      },
      "steps": [
        {
                  "id": "12345678-90ab-cdef-1234-567890abcdef",
          "description": "example description",
          "name": "Require User Confirmation",
                  "taskArgument": {
                    "__typename": "AutomateTaskArgumentConfirmation"
                  }
        }
      ],
      "updatedTime": "2023-08-18T15:53:41.091488Z"
    }
  }
}
```

Get a playbook run by ID

(query.playbookRun)

About this task

The `playbookRun` query requires Automate 1.3 or later and the **Automate Playbook read** permission on the content set to which a playbook belongs to retrieve associated playbook runs.

The following query retrieves a playbook run based on the ID.

```
query exampleGetPlaybookRun($id: ID!) {
  playbookRun(ref: {id: $id}) {
    createdTime
    endTime
    events {
      createdTime
      initiator {
        persona {
```

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```
          id
        }
        user {
          id
        }
      }
      name
    }
    id
    playbook {
      activeRunsCount
      author {
        displayName
        id
        username
      }
      createdTime
      description
      id
      lastModifiedBy {
        displayName
        id
        username
      }
      name
      revision
      steps {
        description
        name
      }
      updatedTime
    }
    runAs {
      persona {
        id
      }
      user {
        id
      }
    }
    scheduleStartTime
    startTime
    status
    steps {
      playbookStep {
        description
        name
                __typename
      }
      status
      error
    }
  }
}
```

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

```
{
  "id": "fedcba09-8765-4321-fedc-ba0987654321"
}
```

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Example response:


```
{
  "data": {
    "playbookRun": {
      "createdTime": "2023-08-18T19:49:13.113955Z",
      "endTime": null,
      "events": [
        {
          "createdTime": "2023-08-18T12:49:13.1127798-07:00",
          "initiator": {
            "persona": null,
            "user": {
              "id": "1"
            }
          },
          "name": "CREATE"
        },
        {
          "createdTime": "2023-08-18T19:49:13.1167809Z",
          "initiator": null,
          "name": "START"
        },
        {
          "createdTime": "2023-08-18T19:49:13.1397834Z",
          "initiator": null,
          "name": "WAIT"
        }
      ],
      "id": "fedcba09-8765-4321-fedc-ba0987654321",
      "playbook": {
        "activeRunsCount": 3,
        "author": {
          "displayName": null,
          "id": "1",
          "username": "Administrator"
        },
        "createdTime": "2023-08-18T19:23:34.008989Z",
        "description": "Example playbook update",
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "lastModifiedBy": {
          "displayName": null,
          "id": "1",
          "username": "Administrator"
        },
        "name": "example_playbook_update",
        },
        "revision": 2,
        "steps": [
          {
            "description": "Example step 1 update: Initiation",
            "name": "example_step_1",
                        "__typename": "PlaybookStepInstruction"
          },
          {
            "description": "Example step 2 update: Processing",
            "name": "example_step_2",
                        "__typename": "PlaybookStepInstruction"
          },
          {
            "description": "Example step 3 update: Resolution",
            "name": "example_step_3",
                        "__typename": "PlaybookStepInstruction"
```


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```
          }
        ],
        "updatedTime": "2023-08-18T19:38:52.458956Z"
      },
      "runAs": {
        "persona": null,
        "user": {
          "id": "1"
        }
      },
      "scheduleStartTime": null,
      "startTime": "2023-08-18T19:49:13.11678Z",
      "status": "WAITING",
      "steps": [
        {
          "playbookStep": {
            "description": "Example step 1 update: Initiation",
            "name": "example_step_1",
                        "__typename": "PlaybookStepInstruction"
          },
          "status": "WAITING",
          "error": ""
        },
        {
          "playbookStep": {
            "description": "Example step 2 update: Processing",
            "name": "example_step_2",
                        "__typename": "PlaybookStepInstruction"
          },
          "status": "NOT_STARTED",
          "error": ""
        },
        {
          "playbookStep": {
            "description": "Example step 3 update: Resolution",
            "name": "example_step_3",
                        "__typename": "PlaybookStepInstruction"
          },
          "status": "NOT_STARTED",
          "error": ""
        }
      ]
    }
  }
}
```


Get a playbook schedule by ID

(query.playbookSchedule)

About this task

The `playbookSchedule` query requires Automate 1.3 or later and the **Automate Playbook read** permission on the content set to which a playbook belongs to retrieve associated playbook schedules.

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The following query retrieves a playbook schedule based on the ID.

```
query exampleGetPlaybookScheduleByID($ref: IdRefInput!) {
  playbookSchedule(ref: $ref) {
    id
    createdTime
    cron
    enabled
    events {
      createdTime
      initiator {
        user {
          id
          displayName
          username
        }
        persona {
          id
        }
      }
      name
    }
    playbook {
      id
      contentSet {
        id
      }
      currentUserHasActiveRun
      description
      name
      revision
    }
    scheduledBy {
      user {
        id
        displayName
        username
      }
      persona {
        id
      }
    }
    updatedTime
  }
}
```

Include the playbook schedule ID variable in the **Variables** panel or in your variables dictionary:

```
{
  "ref": {
    "id": "12345678-90ab-cdef-1234-567890abcdef"
  }
}
```

Example response:

```
{
  "data": {
    "playbookSchedule": {
      "id": "12345678-90ab-cdef-1234-567890abcdef",
```

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```
      "createdTime": "2024-04-12T20:37:54.860756Z",
      "cron": "0 0 1 1 1",
      "enabled": true,
      "events": [],
      "playbook": {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "contentSet": {
          "id": "123"
        },
        "currentUserHasActiveRun": false,
        "description": "Example playbook - Scheduling",
        "name": "example_playbook_scheduling",
        "revision": 3
      },
      "scheduledBy": {
        "user": {
          "id": "1",
          "displayName": null,
          "username": "admin"
        },
        "persona": null
      },
      "updatedTime": "2024-04-12T20:37:54.860756Z"
    }
  }
}
```


Get multiple playbooks

(query.playbooks)

About this task

The `playbooks` query requires Automate 1.3 or later and the **Automate Playbook read** permission on the content set to which a playbook belongs to retrieve associated playbooks.

Note: Queries that request too many fields or too many results might return a `COMPLEXITY_LIMIT_EXCEEDED` error code. Reduce the number of fields in the query request, or update pagination to return fewer results.

Note: Querying `playbook.canRun` might consume a greater amount of resources than querying other fields, and the response might return a `COMPLEXITY_LIMIT_EXCEEDED` error code. Only include this field in a query request if you limit the number of results returned. Consider using `playbook.steps.currentUserMissingPermissions` instead to identify whether a user requires additional permissions to run a step, and for increased query efficiency.

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The following query retrieves the first two playbooks.

```
query exampleGetPlaybooks($first: Int) {
  playbooks(first: $first) {
    edges {
      node {
        createdTime
        description
        id
        name
        notificationSettings {
          email {
            events
            recipients
          }
        }
        revision
        startingStep {
          id
          description
          name
        }
        steps {
          id
          description
          name
          nextStep {
            id
            description
            name
          }
          previousStep {
            id
            description
            name
          }
          taskArgument {
            __typename
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    authorUserIDs
    authorUsers {
      id
      username
      displayName
    }
    contentSetIDs
    contentSets {
      id
      name
      description
    }
    totalRecords
  }
```

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```
}
```

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

```
{
  "first": 2
}
```

Example response:

```
{
  "data": {
    "playbooks": {
      "edges": [
        {
          "node": {
            "createdTime": "2024-04-09T04:19:05.445776Z",
            "description": "",
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "name": "example playbook",
            "notificationSettings": {
              "email": {
                "events": [
                  "START",
                  "COMPLETE",
                  "END",
                  "ERROR",
                  "WAIT"
                ],
                "recipients": [
                  "username@example.com",
                  "username_2@example.com"
                ]
              }
            },
            "revision": 1,
            "startingStep": {
              "id": "fedcba09-8765-4321-fedc-ba0987654321",
              "description": "initial step in playbook",
              "name": "example_start_step"
            },
            "steps": [
              {
                "id": "fedcba09-8765-4321-fedc-ba0987654321",
                "description": "initial step in playbook",
                "name": "example_start_step",
                "nextStep": null,
                "previousStep": null,
                "taskArgument": {
                  "__typename": "AutomateTaskArgumentWait"
                }
              }
            ],
            "updatedTime": "2024-04-09T04:19:05.445776Z"
          }
        },
        {
          "node": {
            "createdTime": "2024-04-11T21:12:37.234882Z",
            "description": "",
            "id": "22345678-90ab-cdef-1234-567890abcde2",
```

```
            "name": "example playbook 2",
            "notificationSettings": {
              "email": {
                "events": [],
                "recipients": []
              }
            },
            "revision": 1,
            "startingStep": {
                          "id": "example-step-id-1",
              "description": "example manual instruction description",
              "name": "Manual Instruction"
            },
            "steps": [
              {
                            "id": "example-step-id-1",
                "description": "example manual instruction description",
                "name": "Manual Instruction",
                "nextStep": {
                               "id": "example-step-id-2",
                  "description": "another example manual description",
                  "name": "Manual Instruction - Cloned"
                },
                "previousStep": null,
                "taskArgument": {
                          "__typename": "AutomateTaskArgumentInstruction"
                        }
              },
              {
                            "id": "example-step-id-2",
                "description": "another example manual description",
                "name": "Manual Instruction - Cloned",
                "nextStep": null,
                "previousStep": {
                  "id": "example-step-id-1",
                  "description": "example manual instruction description",
                  "name": "Manual Instruction"
                },
                "taskArgument": {
                               "__typename": "AutomateTaskArgumentInstruction"
                        }
              }
            ],
            "updatedTime": "2024-04-11T21:12:37.234882Z"
          }
        }
      ],
      "pageInfo": {
        "hasPreviousPage": false,
        "hasNextPage": true,
        "startCursor":
"eyJpZCI6ImU2Nzg1MmNlLTJkZTMtNDljNi1hYjFhLTM3ZGQ3NTdjZTkwMyIsImNyZWF0ZWRfdGltZSI6IjIwMjQtMDQtMDlUMDQ6MTk6MDUuNDQ1Nzc2WiIsIm5hbWUiOiJBZGFtbyAyIn0K",
        "endCursor":
"eyJpZCI6IjEyMzA5NzQ5LWZjMzAtNDcyMi1hZTk4LTU4ZjZjNzA0YzIwYiIsImNyZWF0ZWRfdGltZSI6IjIwMjQtMDQtMTFUMjE6MTI6MzcuMjM0ODgyWiIsIm5hbWUiOiJBZGFtbyAzIn0K"
      },
          "authorUserIDs": [
        "12",
        "23",
        "34"
      ],
      "authorUsers": [
        {
```


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```
          "id": "12",
          "username": "admin",
          "displayName": null
        },
        {
          "id": "23",
          "username": "example_user_1",
          "displayName": null
        },
        {
          "id": "34",
          "username": "example_user_2",
          "displayName": null
        }
      ],
      "contentSetIDs": [
        "1",
        "1234"
      ],
      "contentSets": [
        {
          "id": "1",
          "name": "Reserved",
          "description": "Built in sensors which can not be edited or removed."
        },
        {
          "id": "1234",
          "name": "Automate",
          "description": "Default content set for Tanium Automate"
        }
      ],
      "totalRecords": 15,
    }
  }
}
```


Get multiple playbook runs

(query.playbookRuns)

About this task

The `playbookRuns` query requires Automate 1.3 or later and the **Automate Playbook read** permission on the content set to which a playbook version belongs to retrieve associated playbook runs.



Note: Queries that request too many fields or too many results might return a `COMPLEXITY_LIMIT_EXCEEDED` error code. Reduce the number of fields in the query request, or update pagination to return fewer results.

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Note: Querying `playbook.canRun` might consume a greater amount of resources than querying other fields, and the response might return a `COMPLEXITY_LIMIT_EXCEEDED` error code. Only include this field in a query request if you limit the number of results returned. Consider using `playbook.steps.currentUserMissingPermissions` instead to identify whether a user requires additional permissions to run a step, and for increased query efficiency.

Note: If you do not have access to a content set, and a playbook is reassigned to that content set, you cannot retrieve playbook runs started from this playbook version. You can retrieve playbook runs from an earlier playbook version if you have access to the content set containing the earlier playbook version.

The following query retrieves the first two playbook runs.

```
query exampleGetPlaybookRuns($first: Int) {
  playbookRuns(first: $first) {
    edges {
      node {
        createdTime
        endTime
        events {
          createdTime
          initiator {
            persona {
              id
            }
            user {
              id
            }
          }
          name
        }
        id
        playbook {
          activeRunsCount
          author {
            id
          }
          createdTime
          description
          id
          lastModifiedBy {
            displayName
            id
            username
          }
          name
          revision
          steps {
            description
            name
          }
          updatedTime
```

```
        }
        runAs {
          persona {
            id
          }
          user {
            id
          }
        }
        scheduleStartTime
        startTime
        status
        steps {
          confirmationResult {
            comment
            completedUser {
              id
            }
            completionTime
          }
          playbookStep {
            description
            name
            __typename
          }
          startTime
          status
          error
        }
      }
    }
    initiatorUserIDs
    initiatorUsers {
      id
      username
      displayName
    }
    playbooks {
      playbookID
      playbookName
    }
    pageInfo {
      hasPreviousPage
      hasNextPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first": 2
}
```

Example response:

```
{
  "data": {
```

```
  "playbookRuns": {
    "edges": [
      {
        "node": {
          "createdTime": "2023-08-18T19:47:44.041634Z",
          "endTime": null,
          "events": [
            {
              "createdTime": "2023-08-18T12:47:44.0394017-07:00",
              "initiator": {
                "persona": null,
                "user": {
                  "id": "1"
                }
              },
              "name": "CREATE"
            },
            {
              "createdTime": "2023-08-18T19:47:44.2224093Z",
              "initiator": null,
              "name": "START"
            },
            {
              "createdTime": "2023-08-18T19:47:44.3544268Z",
              "initiator": null,
              "name": "WAIT"
            }
          ],
          "id": "02345678-90ab-cdef-1234-567890abcde0",
          "playbook": {
            "activeRunsCount": 3,
            "author": {
              "id": "1"
            },
            "createdTime": "2023-08-18T19:23:34.008989Z",
            "description": "Example playbook update",
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "lastModifiedBy": {
              "displayName": null,
              "id": "1",
              "username": "Administrator"
            },
            "name": "example_playbook_update",
            "owner": {
              "persona": null,
              "user": {
                "id": "1"
              }
            },
            "revision": 2,
            "steps": [
              {
                "description": "Example step 1 update: Initiation",
                "name": "example_step_1",
                        "__typename": "PlaybookStepInstruction"
              },
              {
                "description": "Example step 2 update: Processing",
                "name": "example_step_2",
                            "__typename": "PlaybookStepInstruction"
              },
              {
                "description": "Example step 3 update: Resolution",
                "name": "example_step_3",
```


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```
                        "__typename": "PlaybookStepInstruction"
          }
        ],
        "updatedTime": "2023-08-18T19:38:52.458956Z"
      },
      "runAs": {
        "persona": null,
        "user": {
          "id": "1"
        }
      },
      "scheduleStartTime": null,
      "startTime": "2023-08-18T19:47:44.222409Z",
      "status": "WAITING",
      "steps": [
        {
          "confirmationResult": null,
          "playbookStep": {
            "description": "Example step 1 update: Initiation",
            "name": "example_step_1",
                        "__typename": "PlaybookStepInstruction"
          },
          "startTime": "2023-08-18T19:47:44.3544268Z",
          "status": "WAITING",
          "error": ""
        },
        {
          "confirmationResult": null,
          "playbookStep": {
            "description": "Example step 2 update: Processing",
            "name": "example_step_2",
                        "__typename": "PlaybookStepInstruction"
          },
          "startTime": null,
          "status": "NOT_STARTED",
          "error": ""
        },
        {
          "confirmationResult": null,
          "playbookStep": {
            "description": "Example step 3 update: Resolution",
            "name": "example_step_3",
                        "__typename": "PlaybookStepInstruction"
          },
          "startTime": null,
          "status": "NOT_STARTED",
          "error": ""
        }
      ]
    }
  },
  {
    "node": {
      "createdTime": "2023-08-18T19:49:13.113955Z",
      "endTime": null,
      "events": [
        {
          "createdTime": "2023-08-18T12:49:13.1127798-07:00",
          "initiator": {
            "persona": null,
            "user": {
              "id": "1"
            }
          },
```


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```
        "name": "CREATE"
      },
      {
        "createdTime": "2023-08-18T19:49:13.1167809Z",
        "initiator": null,
        "name": "START"
      },
      {
        "createdTime": "2023-08-18T19:49:13.1397834Z",
        "initiator": null,
        "name": "WAIT"
      }
    ],
    "id": "22345678-90ab-cdef-1234-567890abcde2",
    "playbook": {
      "activeRunsCount": 3,
      "author": {
        "id": "1"
      },
      "createdTime": "2023-08-18T19:23:34.008989Z",
      "description": "Example playbook update",
      "id": "12345678-90ab-cdef-1234-567890abcdef",
      "lastModifiedBy": {
        "displayName": null,
        "id": "1",
        "username": "Administrator"
      },
      "name": "example_playbook_update",
      "owner": {
        "persona": null,
        "user": {
          "id": "1"
        }
      },
      "revision": 2,
      "steps": [
        {
          "description": "Example step 1 update: Initiation",
          "name": "example_step_1",
                    "__typename": "PlaybookStepInstruction"
        },
        {
          "description": "Example step 2 update: Processing",
          "name": "example_step_2",
                    "__typename": "PlaybookStepInstruction"
        },
        {
          "description": "Example step 3 update: Resolution",
          "name": "example_step_3",
                    "__typename": "PlaybookStepInstruction"
        }
      ],
      "updatedTime": "2023-08-18T19:38:52.458956Z"
    },
    "runAs": {
      "persona": null,
      "user": {
        "id": "1"
      }
    },
    "scheduleStartTime": null,
    "startTime": "2023-08-18T19:49:13.11678Z",
    "status": "WAITING",
    "steps": [
```


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```
            {
              "confirmationResult": null,
              "playbookStep": {
                "description": "Example step 1 update: Initiation",
                "name": "example_step_1",
                            "__typename": "PlaybookStepInstruction"
              },
              "startTime": "2023-08-18T19:49:13.1397834Z",
              "status": "WAITING",
              "error": ""
            },
            {
              "confirmationResult": null,
              "playbookStep": {
                "description": "Example step 2 update: Processing",
                "name": "example_step_2",
                            "__typename": "PlaybookStepInstruction"
              },
              "startTime": null,
              "status": "NOT_STARTED",
              "error": ""
            },
            {
              "confirmationResult": null,
              "playbookStep": {
                "description": "Example step 3 update: Resolution",
                "name": "example_step_3",
                            "__typename": "PlaybookStepInstruction"
              },
              "startTime": null,
              "status": "NOT_STARTED",
              "error": ""
            }
          ]
        }
      }
    ],
    "initiatorUserIDs": [
      "123",
      "234"
    ],
    "initiatorUsers": [
      {
        "id": "123",
        "username": "example_user_1",
        "displayName": null
      },
      {
        "id": "234",
        "username": "example_user_2",
        "displayName": null
      }
    ],
    "playbooks": [
      {
        "playbookID": "12345678-90ab-cdef-1234-567890abcdef",
        "playbookName": "example playbook"
      },
      {
        "playbookID": "fedcba09-8765-4321-fedc-ba0987654321",
        "playbookName": "example playbook 2"
      }
    ],
    "pageInfo": {
```


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```
        "hasPreviousPage": false,
        "hasNextPage": true,
        "startCursor":
"eyJpZCI6IjYxODkwM2FlLWEzMzctNDBjZC04NDljLTY2Y2I0NzFmNTc2OCIsImNyZWF0ZWRfdGltZSI6IjIwMjMtMDgt
MThUMTk6NDc6NDQuMDQxNjM0WiIsInN0YXR1cyI6IldBSVRJTkcifQo=",
        "endCursor":
"eyJpZCI6IjJiM2Q4NTIwLTJjZDktNGY5ZC1iNzdiLWY0ZmFjNWIyOWNlYyIsImNyZWF0ZWRfdGltZSI6IjIwMjMtMDgt
MThUMTk6NDk6MTMuMTEzOTU1WiIsInN0YXR1cyI6IldBSVRJTkcifQo="
      },
      "totalRecords": 5
    }
  }
}
```

Get multiple playbook schedules

(query.playbookSchedules)

About this task

The `playbookSchedules` query requires Automate 1.3 or later and the **Automate Playbook read** permission on the content set to which a playbook belongs to retrieve associated playbook schedules.

> **Note:** Queries that request too many fields or too many results might return a `COMPLEXITY_LIMIT_EXCEEDED` error code. Reduce the number of fields in the query request, or update pagination to return fewer results.

> **Note:** Querying `playbook.canRun` might consume a greater amount of resources than querying other fields, and the response might return a `COMPLEXITY_LIMIT_EXCEEDED` error code. Only include this field in a query request if you limit the number of results returned. Consider using `playbook.steps.currentUserMissingPermissions` instead to identify whether a user requires additional permissions to run a step, and for increased query efficiency.

The following query retrieves the first two playbook schedules.

```
query exampleGetPlaybookSchedules($first: Int) {
  playbookSchedules(first: $first) {
    edges {
      node {
        id
        createdTime
        cron
        enabled
        events {
```

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```
          createdTime
          initiator {
            user {
              id
              displayName
              username
            }
            persona {
              id
            }
          }
          name
        }
        playbook {
          id
          contentSet {
            id
          }
          currentUserHasActiveRun
          description
          name
          revision
        }
        scheduledBy {
          user {
            id
            displayName
            username
          }
          persona {
            id
          }
        }
        updatedTime
      }
    }
    pageInfo {
      hasNextPage
      hasPreviousPage
      startCursor
      endCursor
    }
    totalRecords
  }
}
```

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

```
{
  "first": 2
}
```

Example response:

```
{
  "data": {
    "playbookSchedules": {
      "edges": [
        {
          "node": {
            "id": "12345678-90ab-cdef-1234-567890abcdef",
```

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```
            "createdTime": "2024-03-27T14:38:35.620598Z",
            "cron": "38 14 * * *",
            "enabled": false,
            "events": [],
            "playbook": {
              "id": "567890ab-cdef-1234-5678-90abcdef1234",
              "contentSet": {
                "id": "123"
              },
              "currentUserHasActiveRun": false,
              "description": "",
              "name": "Example Playbook - Scheduling",
              "revision": 1
            },
            "scheduledBy": {
              "user": {
                "id": "1",
                "displayName": null,
                "username": "admin"
              },
              "persona": null
            },
            "updatedTime": "2024-03-27T14:38:59.943286Z"
          }
        },
        {
          "node": {
            "id": "fedcba09-8765-4321-fedc-ba0987654321",
            "createdTime": "2024-03-27T14:41:32.91756Z",
            "cron": "41 14 * * *",
            "enabled": false,
            "events": [],
            "playbook": {
              "id": "ba098765-4321-fedc-ba09-87654321fedc",
              "contentSet": {
                "id": "123"
              },
              "currentUserHasActiveRun": false,
              "description": "",
              "name": "Example Playbook - Scheduling 2",
              "revision": 1
            },
            "scheduledBy": {
              "user": {
                "id": "1",
                "displayName": null,
                "username": "admin"
              },
              "persona": null
            },
            "updatedTime": "2024-03-27T14:42:01.149338Z"
          }
        }
      ],
      "pageInfo": {
        "hasNextPage": true,
        "hasPreviousPage": false,
        "startCursor":
"eyJJRCI6IjBhYmZhMzEwLTdkMDctNGFkZi05YmYxLWQzNTRlOWQ1ODQ1YiIsIkNyZWF0ZWRUaW1lIjoiMjAyNC0wMy0yN1QxNDozODozNS42MjA1OThaIn0K",
        "endCursor":
"eyJJRCI6IjM5MmJkYjIxLWExZGQtNDMxMi04MmRiLTc0NDllNmFhNGZmZiIsIkNyZWF0ZWRUaW1lIjoiMjAyNC0wMy0yN1QxNDo0MTozMi45MTc1NloifQo="
      },
```


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```
      "totalRecords": 31
    }
  }
}
```

Upsert (create or update by ID) a playbook

(mutation.playbookUpsert)

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

Depending on the steps you add to a playbook, you might require additional Tanium solutions and permissions.

When you create a playbook, you define one or more steps as input. Each step contains a reference to the next step ID, and the playbook contains a reference to the first step ID. Depending on the step type, you configure one or more of the following:

- A step name
- A step description
- The next step ID
- The task argument that the step performs
- Additional information to display to a Tanium user, such as an instruction
- Question filtering to narrow the targeted endpoints
- Computer groups or sensors to narrow the targeted endpoints
- A success percentage of endpoints returned to determine whether to move on to the next step in the playbook run
- Other configuration specific to the step or task argument functionality

Starting with the second step in the playbook step sequence, you can configure a step to inherit endpoint targeting information from a prior step in the array based on the step ID. Each step evaluation depends on the step task argument functionality, and progression to the next step might depend on evaluating the percentage of endpoints returned, user input, waiting a specified amount

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of time, or additional success criteria.

Note: Playbooks must have unique names.

Note: Include `isNewRecord` in your request to determine whether the response created a playbook (`isNewRecord` equals `true`) or updated an existing playbook (`isNewRecord` equals `false`).

The following mutation creates a playbook, because no ID is specified in the input, and defines several steps:

```
mutation examplePlaybookUpsertCreate($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      contentSet {
        name
      }
      createdTime
      description
      id
      name
      startingStep {
        id
        name
        description
      }
      steps {
        id
        description
        name
        nextStep {
          id
          name
          taskArgument {
            __typename
          }
        }
        previousStep {
          id
          name
          taskArgument {
            __typename
          }
        }
        taskArgument {
          __typename
        }
      }
    }
    isNewRecord
    error {
```

```
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_upsert_create",
    "description": "Example playbook upsert create",
    "contentSet": {
      "id": "1234"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "12345678-90ab-cdef-1234-567890abcdef",
    "steps": [
      {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_add_tag_windows_step",
        "description": "Example step 1: Add Tags to Windows Machines",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Windows"
            },
            "negated": false,
            "any": true
          }
        },
        "nextStepID": "22345678-90ab-cdef-1234-567890abcde2",
        "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1200
            },
            "completionPercentage": 1,
            "package": {
              "id": "35",
              "name": "Custom Tagging - Add Tags",
              "params": [
                "example_tag"
              ]
            }
          }
        }
```

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```
      },
      {
        "id": "22345678-90ab-cdef-1234-567890abcde2",
        "name": "example_step_2",
        "description": "Example step 2: Verify Windows",
        "nextStepID": "32345678-90ab-cdef-1234-567890abcde3",
        "taskArgument": {
          "instruction": {
            "instruction": "# Process this step, then confirm when complete."
          }
        }
      },
      {
        "id": "32345678-90ab-cdef-1234-567890abcde3",
        "name": "example_remove_tag_windows_step",
        "description": "Example step 3: Remove Tags from Windows Machines",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Windows"
            },
            "negated": false,
            "any": true
          }
        },
        "nextStepID": null,
        "taskArgument": {
          "deployAction": {
            "actionGroup": {
              "id": "3",
              "name": "Default"
            },
            "actionDuration": {
              "seconds": 1200
            },
            "completionPercentage": 1,
            "package": {
              "id": "37",
              "name": "Custom Tagging - Remove Tags"
            }
          }
        }
      }
    ]
  }
}
```

Example response if a playbook was created (`isNewRecord` equals `true`):

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "contentSet": {
          "name": "Automate"
        },
        "createdTime": "2024-08-06T14:26:32.079536Z",
        "description": "Example playbook upsert create",
        "id": "7261c52c-9e3f-427e-a813-0e845f7b89fd",
        "name": "example_playbook_upsert_create",
        "startingStep": {
          "id": "12345678-90ab-cdef-1234-567890abcdef",
```

```
          "name": "example_add_tag_windows_step",
          "description": "Example step 1: Add Tags to Windows Machines"
        },
        "steps": [
          {
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "description": "Example step 1: Add Tags to Windows Machines",
            "name": "example_add_tag_windows_step",
            "nextStep": {
              "id": "22345678-90ab-cdef-1234-567890abcde2",
              "name": "example_step_2",
              "taskArgument": {
                "__typename": "AutomateTaskArgumentInstruction"
              }
            },
            "previousStep": null,
            "taskArgument": {
              "__typename": "AutomateTaskArgumentDeployAction"
            }
          },
          {
            "id": "22345678-90ab-cdef-1234-567890abcde2",
            "description": "Example step 2: Verify Windows",
            "name": "example_step_2",
            "nextStep": {
              "id": "32345678-90ab-cdef-1234-567890abcde3",
              "name": "example_remove_tag_windows_step",
              "taskArgument": {
                "__typename": "AutomateTaskArgumentDeployAction"
              }
            },
            "previousStep": {
              "id": "12345678-90ab-cdef-1234-567890abcdef",
              "name": "example_add_tag_windows_step",
              "taskArgument": {
                "__typename": "AutomateTaskArgumentDeployAction"
              }
            },
            "taskArgument": {
              "__typename": "AutomateTaskArgumentInstruction"
            }
          },
          {
            "id": "32345678-90ab-cdef-1234-567890abcde3",
            "description": "Example step 3: Remove Tags from Windows Machines",
            "name": "example_remove_tag_windows_step",
            "nextStep": null,
            "previousStep": {
              "id": "22345678-90ab-cdef-1234-567890abcde2",
              "name": "example_step_2",
              "taskArgument": {
                "__typename": "AutomateTaskArgumentInstruction"
              }
            },
            "taskArgument": {
              "__typename": "AutomateTaskArgumentDeployAction"
            }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
```


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```
}
```

The following mutation updates an existing playbook with the ID `12345678-90ab-cdef-1234-567890abcdef`, and defines three Instruction steps, which display information to an end user:

```
mutation examplePlaybookUpsertUpdate($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      contentSet {
        name
      }
      createdTime
      description
      id
      name
      startingStep {
        id
        name
        description
      }
      steps {
        id
        description
        name
        nextStep {
          id
          name
          taskArgument {
            __typename
          }
        }
        previousStep {
          id
          name
          taskArgument {
            __typename
          }
        }
      }
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "id": "fedcba09-8765-4321-fedc-ba0987654321",
    "name": "example_playbook_upsert_create",
    "description": "Example playbook upsert create",
    "contentSet": {
      "id": "1234"
    },
```

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```
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "12345678-90ab-cdef-1234-567890abcdef",
    "steps": [
      {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_step_1",
        "description": "Example step 1: Initiation",
        "nextStepID": "22345678-90ab-cdef-1234-567890abcde2",
        "taskArgument": {
          "instruction": {
            "instruction": "# Initiate (start) this step, then confirm when complete."
          }
        }
      },
      {
        "id": "22345678-90ab-cdef-1234-567890abcde2",
        "name": "example_step_2",
        "description": "Example step 2: Processing",
        "nextStepID": "32345678-90ab-cdef-1234-567890abcde3",
        "taskArgument": {
          "instruction": {
            "instruction": "# Work (Process) this step, then confirm when complete."
          }
        }
      },
      {
        "id": "32345678-90ab-cdef-1234-567890abcde3",
        "name": "example_step_3",
        "description": "Example step 3: Resolution",
        "nextStepID": null,
        "taskArgument": {
          "instruction": {
            "instruction": "# Finish (Resolve) this step, then confirm when complete."
          }
        }
      }
    ]
  }
}
```

Example response if an existing playbook was updated (`isNewRecord` equals `false`):

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "contentSet": {
          "name": "Automate"
        },
        "createdTime": "2024-08-06T14:26:32.079536Z",
        "description": "Example playbook upsert create",
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
```

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```
        "name": "example_playbook_upsert_create",
        "startingStep": {
          "id": "12345678-90ab-cdef-1234-567890abcdef",
          "name": "example_step_1",
          "description": "Example step 1: Initiation"
        },
        "steps": [
          {
            "id": "12345678-90ab-cdef-1234-567890abcdef",
            "description": "Example step 1: Initiation",
            "name": "example_step_1",
            "nextStep": {
              "id": "22345678-90ab-cdef-1234-567890abcde2",
              "name": "example_step_2",
              "taskArgument": {
                "__typename": "AutomateTaskArgumentInstruction"
              }
            },
            "previousStep": null
          },
          {
            "id": "22345678-90ab-cdef-1234-567890abcde2",
            "description": "Example step 2: Processing",
            "name": "example_step_2",
            "nextStep": {
              "id": "32345678-90ab-cdef-1234-567890abcde3",
              "name": "example_step_3",
              "taskArgument": {
                "__typename": "AutomateTaskArgumentInstruction"
              }
            },
            "previousStep": {
              "id": "12345678-90ab-cdef-1234-567890abcdef",
              "name": "example_step_1",
              "taskArgument": {
                "__typename": "AutomateTaskArgumentInstruction"
              }
            }
          },
          {
            "id": "32345678-90ab-cdef-1234-567890abcde3",
            "description": "Example step 3: Resolution",
            "name": "example_step_3",
            "nextStep": null,
            "previousStep": {
              "id": "22345678-90ab-cdef-1234-567890abcde2",
              "name": "example_step_2",
              "taskArgument": {
                "__typename": "AutomateTaskArgumentInstruction"
              }
            }
          }
        ]
      },
      "isNewRecord": false,
      "error": null
    }
  }
}
```


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Upsert (create or update by ID) a playbook schedule

(mutation.playbookScheduleUpsert)

The `playbookScheduleUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook execute** permission on the content set to which the associated playbook belongs to create or update a playbook schedule.

Create playbook schedule objects with a reference to a playbook ID to associate a given schedule with the playbook. Playbook runs for this playbook start based on the configured cron expression.

The following mutation creates a playbook schedule, because no playbook schedule ID is specified in the input. This playbook schedule is associated with playbook ID `fedcba09-8765-4321-fedc-ba0987654321` and runs using the computer group management permissions of the user and persona submitting the mutation request.



Note: Include `isNewRecord` in your request to determine whether the response created a playbook schedule (`isNewRecord` equals `true`) or updated an existing playbook schedule (`isNewRecord` equals `false`).

```
mutation examplePlaybookScheduleCreate($input: PlaybookScheduleUpsertInput!) {
  playbookScheduleUpsert(input: $input) {
    playbookSchedule {
      id
      createdTime
      cron
      enabled
      events {
        createdTime
        initiator {
          user {
            id
            displayName
            username
          }
          persona {
            id
          }
        }
        name
      }
      playbook {
        id
        contentSet {
          id
        }
        description
        name
```

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```
      }
      scheduledBy {
        user {
          id
          displayName
          username
        }
        persona {
          id
        }
      }
      updatedTime
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "playbookID": "fedcba09-8765-4321-fedc-ba0987654321",
    "cron": "0 0 1 1 1",
    "enabled": true
  }
}
```

Example response if a playbook schedule was created (`isNewRecord` equals `true`):

```
{
  "data": {
    "playbookScheduleUpsert": {
      "playbookSchedule": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "createdTime": "2024-04-12T19:41:43.118622Z",
        "cron": "0 0 1 1 1",
        "enabled": true,
                "events": [],
        "playbook": {
          "id": "fedcba09-8765-4321-fedc-ba0987654321",
          "contentSet": {
            "id": "123"
          },
          "description": "Example playbook - Scheduling",
          "name": "example_playbook_scheduling"
        },
        "scheduledBy": {
          "user": {
            "id": "1",
            "displayName": null,
            "username": "admin"
          },
          "persona": null
        },
        "updatedTime": "2024-04-12T19:41:43.118622Z"
      },
```

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```
      "isNewRecord": true,
      "error": null
    }
  }
}
```

The following mutation updates an existing playbook schedule with the ID `12345678-90ab-cdef-1234-567890abcdef`, changing the cron expression:

```
mutation examplePlaybookScheduleUpdate($input: PlaybookScheduleUpsertInput!) {
  playbookScheduleUpsert(input: $input) {
    playbookSchedule {
      id
      createdTime
      cron
      enabled
      events {
        createdTime
        initiator {
          user {
            id
            displayName
            username
          }
          persona {
            id
          }
        }
        name
      }
      nextRunTime
      playbook {
        id
        contentSet {
          id
        }
        description
        name
      }
      scheduledBy {
        user {
          id
          displayName
          username
        }
        persona {
          id
        }
      }
      updatedTime
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

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```
{
  "input": {
    "id": "12345678-90ab-cdef-1234-567890abcdef",
    "playbookID": "fedcba09-8765-4321-fedc-ba0987654321",
    "cron": "0 0 1 1 2",
    "enabled": true
  }
}
```

Example response if an existing playbook schedule was updated (`isNewRecord` equals `false`):

```
{
  "data": {
    "playbookScheduleUpsert": {
      "playbookSchedule": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "createdTime": "2024-04-12T19:41:43.118622Z",
        "cron": "0 0 1 1 2",
        "enabled": true,
        "events": [],
        "playbook": {
          "id": "fedcba09-8765-4321-fedc-ba0987654321",
          "contentSet": {
            "id": "123"
          },
          "description": "Example playbook - Scheduling",
          "name": "example_playbook_scheduling"
        },
        "scheduledBy": {
          "user": {
            "id": "1",
            "displayName": null,
            "username": "admin"
          },
          "persona": null
        },
        "updatedTime": "2024-04-12T19:41:43.118622Z"
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

Delete a playbook

(mutation.playbookPerformOperation)

About this task

Stability: 1.2 - Experimental (Release Candidate)

The `playbookPerformOperation` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to perform the delete operation on associated playbooks.

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The following mutation performs the `DELETE` operation on the playbook that matches the ID. This deletes the playbook and future-scheduled playbook runs associated with the playbook, but does not delete in-progress playbook runs associated with the playbook.

Note: The `PlaybookOperation` object enumerates available playbook operations.

```
mutation exampleDeletePlaybook($id: ID!, $operation: PlaybookOperation!) {
  playbookPerformOperation(input: {id: $id, operation: $operation}) {
    playbook {
      activeRunsCount
      author {
        displayName
        id
        username
      }
      createdTime
      description
      id
      lastModifiedBy {
        displayName
        id
        username
      }
      name
      revision
      runs {
        edges {
          node {
            createdTime
            endTime
            events {
              createdTime
              name
              initiator {
                user {
                  displayName
                  id
                  username
                }
                persona {
                  id
                }
              }
            }
            id
            playbook {
              id
            }
            runAs {
              user {
                displayName
                id
                username
              }
              persona {
                id
              }
```

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```
            }
            scheduleStartTime
            startTime
            status
            steps {
              error
              startTime
              endTime
            }
          }
        }
      }
      steps {
        description
        name
      }
      updatedTime
    }
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "id": "12345678-90ab-cdef-1234-567890abcdef",
  "operation": "DELETE"
}
```

Example response:

```
{
  "data": {
    "playbookPerformOperation": {
      "playbook": {
        "activeRunsCount": 3,
        "author": {
          "displayName": null,
          "id": "1",
          "username": "Administrator"
        },
        "createdTime": "2023-08-18T19:23:34.008989Z",
        "description": "Example playbook update",
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "lastModifiedBy": {
          "displayName": null,
          "id": "1",
          "username": "Administrator"
        },
        "name": "example_playbook_update",
        "revision": 3,
        "runs": {
          "edges": [
            {
              "node": {
                "createdTime": "2023-08-18T19:47:44.041634Z",
                "endTime": null,
```

```
        "events": [
          {
            "createdTime": "2023-08-18T12:47:44.0394017-07:00",
            "name": "CREATE",
            "initiator": {
              "user": {
                "displayName": null,
                "id": "1",
                "username": "Administrator"
              },
              "persona": null
            }
          },
          {
            "createdTime": "2023-08-18T19:47:44.2224093Z",
            "name": "START",
            "initiator": null
          },
          {
            "createdTime": "2023-08-18T19:47:44.3544268Z",
            "name": "WAIT",
            "initiator": null
          }
        ],
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "playbook": {
          "id": "12345678-90ab-cdef-1234-567890abcdef"
        },
        "runAs": {
          "user": {
            "displayName": null,
            "id": "1",
            "username": "Administrator"
          },
          "persona": null
        },
        "scheduleStartTime": null,
        "startTime": "2023-08-18T19:47:44.222409Z",
        "status": "WAITING",
        "steps": [
          {
            "error": "",
            "startTime": "2023-08-18T19:47:44.3544268Z",
            "endTime": null
          },
          {
            "error": "",
            "startTime": null,
            "endTime": null
          },
          {
            "error": "",
            "startTime": null,
            "endTime": null
          },
          {
            "error": "",
            "startTime": null,
            "endTime": null
          }
        ]
      }
    },
    {
      "node": {
        "createdTime": "2023-08-18T19:49:13.113955Z",
        "endTime": null,
        "events": [
          {
```


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```
              "createdTime": "2023-08-18T12:49:13.1127798-07:00",
              "name": "CREATE",
              "initiator": {
                "user": {
                  "displayName": null,
                  "id": "1",
                  "username": "Administrator"
                },
                "persona": null
              }
            },
            {
              "createdTime": "2023-08-18T19:49:13.1167809Z",
              "name": "START",
              "initiator": null
            },
            {
              "createdTime": "2023-08-18T19:49:13.1397834Z",
              "name": "WAIT",
              "initiator": null
            }
          ],
          "id": "eedcba09-8765-4321-fedc-ba098765432e",
          "playbook": {
            "id": "12345678-90ab-cdef-1234-567890abcdef"
          },
          "runAs": {
            "user": {
              "displayName": null,
              "id": "1",
              "username": "Administrator"
            },
            "persona": null
          },
          "scheduleStartTime": null,
          "startTime": "2023-08-18T19:49:13.11678Z",
          "status": "WAITING",
          "steps": [
            {
              "error": "",
              "startTime": "2023-08-18T19:49:13.1397834Z",
              "endTime": null
            },
            {
              "error": "",
              "startTime": null,
              "endTime": null
            },
            {
              "error": "",
              "startTime": null,
              "endTime": null
            },
            {
              "error": "",
              "startTime": null,
              "endTime": null
            }
          ]
        }
      },
      {
        "node": {
          "createdTime": "2023-08-18T19:49:17.873797Z",
          "endTime": null,
          "events": [
            {
              "createdTime": "2023-08-18T12:49:17.8731032-07:00",
              "name": "CREATE",
```


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```
                "initiator": {
                  "user": {
                    "displayName": null,
                    "id": "1",
                    "username": "Administrator"
                  },
                  "persona": null
                }
              },
              {
                "createdTime": "2023-08-18T19:49:18.1610911Z",
                "name": "START",
                "initiator": null
              },
              {
                "createdTime": "2023-08-18T19:49:18.2150748Z",
                "name": "WAIT",
                "initiator": null
              }
            ],
            "id": "dedcba09-8765-4321-fedc-ba098765432d",
            "playbook": {
              "id": "12345678-90ab-cdef-1234-567890abcdef"
            },
            "runAs": {
              "user": {
                "displayName": null,
                "id": "1",
                "username": "Administrator"
              },
              "persona": null
            },
            "scheduleStartTime": null,
            "startTime": "2023-08-18T19:49:18.161091Z",
            "status": "WAITING",
            "steps": [
              {
                "error": "",
                "startTime": "2023-08-18T19:49:18.2150748Z",
                "endTime": null
              },
              {
                "error": "",
                "startTime": null,
                "endTime": null
              },
              {
                "error": "",
                "startTime": null,
                "endTime": null
              },
              {
                "error": "",
                "startTime": null,
                "endTime": null
              }
            ]
          }
        }
      ]
    },
    "steps": [
      {
        "description": "Example step 1 update: Initiation",
        "name": "example_step_1"
      },
      {
        "description": "Example step 2 update: Processing",
        "name": "example_step_2"
```


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```
          },
          {
            "description": "Example step 3 update: Resolution",
            "name": "example_step_3"
          }
        ],
        "updatedTime": "2023-08-18T20:46:48.99018Z"
      },
      "error": null
    }
  }
}
```

Delete a playbook schedule

(mutation.playbookSchedulePerformOperation)

About this task

Stability: 1.2 - Experimental (Release Candidate)

The `playbookSchedulePerformOperation` mutation requires Automate 1.3 or later and:

- the **Automate Playbook execute** permission on the content set to which the associated playbook belongs, if you created the playbook schedule with your currently active persona, or
- the **Automate Playbook write** permission on the content set to which the associated playbook belongs, if another user created the playbook schedule, or you created the playbook schedule with a different persona than your currently active persona

The following mutation performs the `DELETE` operation on the playbook schedule that matches the ID. This deletes a playbook schedule.

Note: The `PlaybookScheduleOperation` object enumerates available playbook schedule operations.

```
mutation exampleDeletePlaybookScheduleOperation($input:
PlaybookSchedulePerformOperationInput!) {
  playbookSchedulePerformOperation(input: $input) {
    playbookSchedule {
      id
      createdTime
      cron
      enabled
      events {
        createdTime
```

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```
        initiator {
          user {
            id
            displayName
            username
          }
          persona {
            id
          }
        }
        name
      }
      playbook {
        id
        description
        name
      }
      scheduledBy {
        user {
          id
          displayName
          username
        }
        persona {
          id
        }
      }
      updatedTime
    }
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "id": "12345678-90ab-cdef-1234-567890abcdef",
    "operation": "DELETE"
  }
}
```

Example response:

```
{
  "data": {
    "playbookSchedulePerformOperation": {
      "playbookSchedule": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "createdTime": "2024-04-12T19:41:43.118622Z",
        "cron": "0 0 1 1 1",
        "enabled": true,
        "events": [],
        "playbook": {
          "id": "fedcba09-8765-4321-fedc-ba0987654321",
          "description": "Example playbook - Scheduling",
          "name": "example_playbook_scheduling"
```

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```
        },
        "scheduledBy": {
          "user": {
            "id": "1",
            "displayName": null,
            "username": "admin"
          },
          "persona": null
        },
        "updatedTime": "2024-04-12T20:13:30.603601Z"
      },
      "error": null
    }
  }
}
```

Disable an enabled playbook schedule

(mutation.playbookSchedulePerformOperation)

About this task

Stability: 1.2 - Experimental (Release Candidate)

The `playbookSchedulePerformOperation` mutation requires Automate 1.3 or later and:

- the **Automate Playbook execute** or **Automate Playbook write** permission on the content set to which the associated playbook belongs, if you created the playbook schedule with your currently active persona, or
- the **Automate Playbook write** permission on the content set to which the associated playbook belongs, if another user created the playbook schedule, or you created the playbook schedule with a different persona than your currently active persona

The following mutation performs the `DISABLE` operation on the playbook schedule that matches the ID. This disables an enabled playbook schedule. No playbook runs are started from disabled playbook schedules. This has no effect on disabled playbook schedules.



Note: The `PlaybookScheduleOperation` object enumerates available playbook schedule operations.

```
mutation exampleDisablePlaybookScheduleOperation($input:
PlaybookSchedulePerformOperationInput!) {
  playbookSchedulePerformOperation(input: $input) {
    playbookSchedule {
      id
```

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```
      createdTime
      cron
      enabled
      events {
        createdTime
        initiator {
          user {
            id
            displayName
            username
          }
          persona {
            id
          }
        }
        name
      }
      playbook {
        id
        description
        name
      }
      scheduledBy {
        user {
          id
          displayName
                  username
        }
        persona {
          id
        }
      }
      updatedTime
    }
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "id": "12345678-90ab-cdef-1234-567890abcdef",
    "operation": "DISABLE"
  }
}
```

Example response:

```
{
  "data": {
    "playbookSchedulePerformOperation": {
      "playbookSchedule": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "createdTime": "2024-04-12T19:41:43.118622Z",
        "cron": "0 0 1 1 1",
        "enabled": false,
```

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```
        "events": [
          {
            "createdTime": "2024-12-03T19:17:14.056452452Z",
            "initiator": {
              "user": {
                "id": "1",
                "displayName": null,
                "username": "admin"
              },
              "persona": null
            },
            "name": "DISABLED_BY_USER"
          }
        ],
        "playbook": {
          "id": "fedcba09-8765-4321-fedc-ba0987654321",
          "description": "Example playbook - Scheduling",
          "name": "example_playbook_scheduling"
        },
        "scheduledBy": {
          "user": {
            "id": "1",
            "displayName": null,
            "username": "admin"
          },
          "persona": null
        },
        "updatedTime": "2024-04-12T20:13:30.603601Z"
      },
      "error": null
    }
  }
}
```


Enable a disabled playbook schedule

(mutation.playbookSchedulePerformOperation)

About this task

Stability: 1.2 - Experimental (Release Candidate)

The `playbookSchedulePerformOperation` mutation requires Automate 1.3 or later and:

- the **Automate Playbook execute** permission on the content set to which the associated playbook belongs, if you created the playbook schedule with your currently active persona

The following mutation performs the `ENABLE` operation on the playbook schedule that matches the ID. This enables a disabled playbook schedule. This has no effect on enabled playbook schedules.

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Note: The `PlaybookScheduleOperation` object enumerates available playbook schedule operations.

```
mutation exampleEnablePlaybookScheduleOperation($input:
PlaybookSchedulePerformOperationInput!) {
  playbookSchedulePerformOperation(input: $input) {
    playbookSchedule {
      id
      createdTime
      cron
      enabled
      events {
        createdTime
        initiator {
          user {
            id
            displayName
            username
          }
          persona {
            id
          }
        }
        name
      }
      playbook {
        id
        description
        name
      }
      scheduledBy {
        user {
          id
          displayName
                  username
        }
        persona {
          id
        }
      }
      updatedTime
    }
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "id": "12345678-90ab-cdef-1234-567890abcdef",
    "operation": "ENABLE"
  }
}
```

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Example response:


```
{
  "data": {
    "playbookSchedulePerformOperation": {
      "playbookSchedule": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "createdTime": "2024-04-12T19:41:43.118622Z",
        "cron": "0 0 1 1 1",
        "enabled": true,
        "events": [
          {
            "createdTime": "2024-12-03T19:17:14.056452452Z",
            "initiator": {
              "user": {
                "id": "1",
                "displayName": null,
                "username": "admin"
              },
              "persona": null
            },
            "name": "DISABLED_BY_USER"
          }
        ],
        "playbook": {
          "id": "fedcba09-8765-4321-fedc-ba0987654321",
          "description": "Example playbook - Scheduling",
          "name": "example_playbook_scheduling"
        },
        "scheduledBy": {
          "user": {
            "id": "1",
            "displayName": null,
            "username": "admin"
          },
          "persona": null
        },
        "updatedTime": "2024-04-12T20:13:30.603601Z"
      },
      "error": null
    }
  }
}
```


End a playbook run

(mutation.playbookRunPerformOperation)

Stability: 1.2 - Experimental (Release Candidate)

The `playbookRunPerformOperation` mutation requires Automate 1.3 or later and the **Automate Playbook execute** permission on the playbook content set.

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Note: To end a playbook run, you must have the same permissions as required to run the playbook.

The following mutation performs the `END` operation on the playbook run that matches the ID. This ends a playbook run.

Note: The `PlaybookRunOperation` object enumerates available playbook run operations.

```
mutation exampleEndPlaybookRunOperation($input: PlaybookRunPerformOperationInput!) {
  playbookRunPerformOperation(
    input: $input
  ) {
    playbookRun {
      createdTime
      endTime
      events {
        createdTime
        initiator {
          persona {
            id
          }
          user {
            id
          }
        }
        name
      }
      id
      playbook {
        id
      }
      runAs {
        persona {
          id
        }
        user {
          id
        }
      }
      scheduleStartTime
      startTime
      status
      steps {
        confirmationResult {
          comment
          completedUser {
            id
          }
          completionTime
        }
        endTime
        playbookStep {
          description
          name
```

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```
        }
        startTime
        status
        error
      }
    }
  }
}
```

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

```
{
  "input": {
    "id": "fedcba09-8765-4321-fedc-ba0987654321",
    "operation": "END"
  }
}
```

Example response:

```
{
  "data": {
    "playbookRunPerformOperation": {
      "playbookRun": {
        "createdTime": "2023-08-18T19:49:13.113955Z",
        "endTime": null,
        "events": [
          {
            "createdTime": "2023-08-18T12:49:13.1127798-07:00",
            "initiator": {
              "persona": null,
              "user": {
                "id": "1"
              }
            },
            "name": "CREATE"
          },
          {
            "createdTime": "2023-08-18T19:49:13.1167809Z",
            "initiator": null,
            "name": "START"
          },
          {
            "createdTime": "2023-08-18T19:49:13.1397834Z",
            "initiator": null,
            "name": "WAIT"
          }
        ],
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "playbook": {
          "id": "12345678-90ab-cdef-1234-567890abcdef"
        },
        "runAs": {
          "persona": null,
          "user": {
            "id": "1"
          }
        },
        "scheduleStartTime": null,
        "startTime": "2023-08-18T19:49:13.11678Z",
        "status": "ENDING",
```

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```
        "steps": [
          {
            "confirmationResult": null,
            "endTime": null,
            "playbookStep": {
              "description": "Example step 1 update: Initiation",
              "name": "example_step_1"
            },
            "startTime": "2023-08-18T19:49:13.1397834Z",
            "status": "WAITING",
            "error": ""
          },
          {
            "confirmationResult": null,
            "endTime": null,
            "playbookStep": {
              "description": "Example step 2 update: Processing",
              "name": "example_step_2"
            },
            "startTime": null,
            "status": "NOT_STARTED",
            "error": ""
          },
          {
            "confirmationResult": null,
            "endTime": null,
            "playbookStep": {
              "description": "Example step 3 update: Resolution",
              "name": "example_step_3"
            },
            "startTime": null,
            "status": "NOT_STARTED",
            "error": ""
          }
        ]
      }
    }
  }
}
```


Pause a running playbook run

(mutation.playbookRunPerformOperation)

About this task

Stability: 1.2 - Experimental (Release Candidate)

The `playbookRunPerformOperation` mutation requires Automate 1.3 or later and the **Automate Playbook execute** permission on the playbook content set.

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Note: To pause a playbook run, you must have the same permissions as required to run the playbook.

The following mutation performs the `PAUSE` operation on the playbook run that matches the ID. This pauses a running playbook run.

Note: The `PlaybookRunOperation` object enumerates available playbook run operations.

```
mutation examplePausePlaybookRunOperation($input: PlaybookRunPerformOperationInput!) {
  playbookRunPerformOperation(
    input: $input
  ) {
    playbookRun {
      createdTime
      endTime
      events {
        createdTime
        initiator {
          persona {
            id
          }
          user {
            id
          }
        }
        name
      }
      id
      playbook {
        id
      }
      runAs {
        persona {
          id
        }
        user {
          id
        }
      }
      scheduleStartTime
      startTime
      status
      steps {
        confirmationResult {
          comment
          completedUser {
            id
          }
          completionTime
        }
        endTime
        playbookStep {
          description
          name
```

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```
        }
        startTime
        status
        error
      }
    }
  }
}
```

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

```
{
  "input": {
    "id": "fedcba09-8765-4321-fedc-ba0987654321",
    "operation": "PAUSE"
  }
}
```

Example response:

```
{
  "data": {
    "playbookRunPerformOperation": {
      "playbookRun": {
        "createdTime": "2023-08-18T19:49:13.113955Z",
        "endTime": null,
        "events": [
          {
            "createdTime": "2023-08-18T12:49:13.1127798-07:00",
            "initiator": {
              "persona": null,
              "user": {
                "id": "1"
              }
            },
            "name": "CREATE"
          },
          {
            "createdTime": "2023-08-18T19:49:13.1167809Z",
            "initiator": null,
            "name": "START"
          },
          {
            "createdTime": "2023-08-18T19:49:13.1397834Z",
            "initiator": null,
            "name": "WAIT"
          }
        ],
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "playbook": {
          "id": "12345678-90ab-cdef-1234-567890abcdef"
        },
        "runAs": {
          "persona": null,
          "user": {
            "id": "1"
          }
        },
        "scheduleStartTime": null,
        "startTime": "2023-08-18T19:49:13.11678Z",
        "status": "PAUSING",
```

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```
        "steps": [
          {
            "confirmationResult": null,
            "endTime": null,
            "playbookStep": {
              "description": "Example step 1 update: Initiation",
              "name": "example_step_1"
            },
            "startTime": "2023-08-18T19:49:13.1397834Z",
            "status": "WAITING",
            "error": ""
          },
          {
            "confirmationResult": null,
            "endTime": null,
            "playbookStep": {
              "description": "Example step 2 update: Processing",
              "name": "example_step_2"
            },
            "startTime": null,
            "status": "NOT_STARTED",
            "error": ""
          },
          {
            "confirmationResult": null,
            "endTime": null,
            "playbookStep": {
              "description": "Example step 3 update: Resolution",
              "name": "example_step_3"
            },
            "startTime": null,
            "status": "NOT_STARTED",
            "error": ""
          }
        ]
      }
    }
  }
}
```


Resume a paused playbook run

(mutation.playbookRunPerformOperation)

About this task

Stability: 1.2 - Experimental (Release Candidate)

The `playbookRunPerformOperation` mutation requires Automate 1.3 or later and the **Automate Playbook execute** permission on the playbook content set.

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Note: To resume a playbook run, you must have the same permissions as required to run the playbook.

The following mutation performs the `RESUME` operation on the playbook run that matches the ID. This resumes a paused playbook run.

Note: The `PlaybookRunOperation` object enumerates available playbook run operations.

```
mutation exampleResumePlaybookRunOperation($input: PlaybookRunPerformOperationInput!) {
  playbookRunPerformOperation(
    input: $input
  ) {
    playbookRun {
      createdTime
      endTime
      events {
        createdTime
        initiator {
          persona {
            id
          }
          user {
            id
          }
        }
        name
      }
      id
      playbook {
        id
      }
      runAs {
        persona {
          id
        }
        user {
          id
        }
      }
      scheduleStartTime
      startTime
      status
      steps {
        confirmationResult {
          comment
          completedUser {
            id
          }
          completionTime
        }
        endTime
        playbookStep {
          description
          name
```

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```
        }
        startTime
        status
        error
      }
    }
  }
}
```

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

```
{
  "input": {
    "id": "fedcba09-8765-4321-fedc-ba0987654321",
    "operation": "RESUME"
  }
}
```

Example response:

```
{
  "data": {
    "playbookRunPerformOperation": {
      "playbookRun": {
        "createdTime": "2023-08-18T19:49:13.113955Z",
        "endTime": null,
        "events": [
          {
            "createdTime": "2023-08-18T12:49:13.1127798-07:00",
            "initiator": {
              "persona": null,
              "user": {
                "id": "1"
              }
            },
            "name": "CREATE"
          },
          {
            "createdTime": "2023-08-18T19:49:13.1167809Z",
            "initiator": null,
            "name": "START"
          },
          {
            "createdTime": "2023-08-18T19:49:13.1397834Z",
            "initiator": null,
            "name": "WAIT"
          }
        ],
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "playbook": {
          "id": "12345678-90ab-cdef-1234-567890abcdef"
        },
        "runAs": {
          "persona": null,
          "user": {
            "id": "1"
          }
        },
        "scheduleStartTime": null,
        "startTime": "2023-08-18T19:49:13.11678Z",
        "status": "RESUMING",
```

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```
        "steps": [
          {
            "confirmationResult": null,
            "endTime": null,
            "playbookStep": {
              "description": "Example step 1 update: Initiation",
              "name": "example_step_1"
            },
            "startTime": "2023-08-18T19:49:13.1397834Z",
            "status": "WAITING",
            "error": ""
          },
          {
            "confirmationResult": null,
            "endTime": null,
            "playbookStep": {
              "description": "Example step 2 update: Processing",
              "name": "example_step_2"
            },
            "startTime": null,
            "status": "NOT_STARTED",
            "error": ""
          },
          {
            "confirmationResult": null,
            "endTime": null,
            "playbookStep": {
              "description": "Example step 3 update: Resolution",
              "name": "example_step_3"
            },
            "startTime": null,
            "status": "NOT_STARTED",
            "error": ""
          }
        ]
      }
    }
  }
}
```


Update playbook content set membership

(mutation.playbookContentSetUpdate)

About this task

Stability: 1.2 - Experimental (Release Candidate)

The `playbookContentSetUpdate` mutation requires Automate 1.5 or later and the **Automate Playbook write** permission on the playbook content set to update a playbook content set membership.

The following mutation updates the playbook with the ID `12345678-90ab-cdef-1234-567890abcdef` to belong to the content set with the ID `2`:

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```
mutation exampleChangePlaybookContentSet($input: PlaybookContentSetUpdateInput!) {
  playbookContentSetUpdate(input: $input) {
    playbook {
      id
      name
      contentSet {
        id
        name
        description
      }
      description
      updatedTime
    }
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "id": "12345678-90ab-cdef-1234-567890abcdef",
    "contentSet": {
      "id": "2"
    }
  }
}
```

Example response:

```
{
  "data": {
    "playbookContentSetUpdate": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example playbook content set update",
        "contentSet": {
          "id": "2",
          "name": "Default",
          "description": null
        },
        "description": "example description",
        "updatedTime": "2024-11-15T20:07:29.166156Z"
      },
      "error": null
    }
  }
}
```

Add Install Patch step to a playbook

(mutation.upsertPlaybook (input.steps))

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About this task

Stability: 1.1 - Experimental (Active Development)

The `playbookUpsert` mutation requires Automate 1.3 or later and the **Automate Playbook write** permission on the playbook content set to create or update a playbook.

The **Install Patch** step requires Patch 3.16.191 or later and the following permissions:

- **Computer Group read** permission
- **Patch Deployment execute** permission
- **Patch Deployment write** permission
- **Sensor read** permission

Depending on the deployment, the **Install Patch** step might require additional Patch permissions.

The **Install Patch** step deploys a patch to targeted endpoints. The **Install Patch** step always creates a one-time deployment. The patch content download and patch deployment both start when the **Install Patch** step starts. You cannot configure an **Install Patch** step to create an ongoing patch deployment, configure a start time or end time, or configure patch content downloaded to endpoints prior to the patch deployment start.



Note: The Install Patch step does not support uploading title icons or body images for end user notifications.

The following mutation creates a playbook, because no ID is specified in the input, and defines an **Install Patch** step that deploys a Windows patch on the targeted endpoints belonging to the **All Windows** computer group:

```
mutation exampleUpsertPlaybookInstallPatch($input: PlaybookUpsertInput!) {
  playbookUpsert(input: $input) {
    playbook {
      id
      name
      steps {
        description
        name
        taskArgument {
          __typename
        }
      }
```

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```
    }
    isNewRecord
    error {
      message
      retryable
      timedOut
    }
  }
}
```

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

```
{
  "input": {
    "name": "example_playbook_install_patch",
    "description": "Example playbook - Install Patch step",
    "contentSet": {
      "id": "123"
    },
    "notificationSettings": {
      "email": {
        "events": [
          "START",
          "END"
        ],
        "recipients": [
          "host@example.com"
        ]
      }
    },
    "startingStepID": "fedcba09-8765-4321-fedc-ba0987654321",
    "steps": [
      {
        "id": "fedcba09-8765-4321-fedc-ba0987654321",
        "name": "example_install_patch_step",
        "description": "Example step 1: Install Patch on Windows endpoints",
        "endpointTargeting": {
          "customTargeting": {
            "memberOf": {
              "name": "All Windows"
            },
            "negated": false,
            "any": true
          }
        },
                "taskArgument": {
          "patchInstallDeployment": {
            "completionPercentage": 1,
            "patchDeploymentConfig": {
              "contentDeploymentType": "MANUAL_SELECTION",
              "contentSet": {
                "id": "1"
              },
              "description": "example Patch deployment for Windows",
              "distributeOver": {
                "seconds": 900
              },
              "eussHideFromActivity": false,
              "name": "example_deployment_windows",
              "overrideBlocklists": false,
              "overrideMaintenanceWindows": false,
              "patches": [],
```

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```
              "patchLists": [
                {
                  "id": "12",
                  "version": null
                }
              ],
              "platform": "WINDOWS",
              "postDeploymentNotification": {
                "body": "Example body",
                "countdownToDeadline": {
                  "seconds": 600
                },
                "includeFrame": false,
                "notificationPeriodDuration": {
                  "seconds": 7200
                },
                "postponeOptions": {
                  "durationOne": {
                    "seconds": 1800
                  },
                  "durationTwo": {
                    "seconds": 1200
                  },
                  "durationThree": {
                    "seconds": 600
                  }
                },
                "title": "Example title",
                "translations": [
                  {
                    "body": "ejemplo",
                    "languageCode": "es",
                    "title": "ejemplo"
                  }
                ]
              },
              "restart": true
            },
                        "deploymentDuration": {
                          "nanoseconds": 0,
                          "seconds": 86400
                        },
                        "skipVerification": false
          }
        }
      }
    ]
  }
}
```

Example response:

```
{
  "data": {
    "playbookUpsert": {
      "playbook": {
        "id": "12345678-90ab-cdef-1234-567890abcdef",
        "name": "example_playbook_install_patch",
        "steps": [
          {
            "description": "Example step 1: Install Patch on Windows endpoints",
            "name": "example_install_patch_step",
```

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```
                    "taskArgument": {
            "__typename": "AutomateTaskArgumentPatchInstallDeployment"
                    }
          }
        ]
      },
      "isNewRecord": true,
      "error": null
    }
  }
}
```

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Reference: Steps

Use this reference to learn about the requirements, parameters, and usage for the steps that you can add to playbooks.

Add Custom Tag (Non-Windows)

Deploy the **Custom Tagging (Non-Windows) - Add Tags** package to target endpoints managed using Tanium™ Client that are not running Windows, such as Linux or macOS. The package assigns one or more custom tags to targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

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Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Add Custom Tag (Non-Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Custom Tagging (Non-Windows) - Add Tags** package.	Read-only

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Field	Description	Required
	Note: Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Add tags	Enter a space-delimited list of string values to apply as custom tags. **Note:** If you want to apply a tag that contains a space character, you must use the `#|#` character sequence as a delimiter.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target.	Required

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Field	Description	Required
	For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact. The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout**. If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout.	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified**. • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends.	Required

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Field	Description	Required
	Note: The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Add Custom Tag (Windows)

Deploy the **Custom Tagging - Add Tags** package to target Windows endpoints, which assigns one or more custom tags to targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

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Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Add Custom Tag (Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Custom Tagging - Add Tags** package.	Read-only

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Field	Description	Required
	Note: Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Add tags	Enter a space-delimited list of string values to apply as custom tags. **Note:** If you want to apply a tag that contains a space character, you must use the `#|#` character sequence as a delimiter.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target.	Required

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Field	Description	Required
	For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact. The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout**. If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout.	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified**. • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends.	Required

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Field	Description	Required
	Note: The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Communicate with an API

Send an HTTP request to an external API that you configured for use with Automate. Use this step to integrate playbooks with third-party systems, such as creating a ticket in an IT service management system or posting a message to a messaging platform.

Note: Before you can add this step, you must create an API configuration. If the API requires authentication, also create an authentication configuration. For more information, see Managing API and authentication configurations on page 45.

Required solutions

The **Communicate with an API** step does not require any additional Tanium solutions.

Required permissions

No additional permissions are required to add this step.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

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Fields for the Communicate with an API step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
API Configuration	Click **Select Configuration** and select the API configuration that defines the host, path, method, headers, and body of the request. For more information, see Managing API and authentication configurations on page 45. If the API configuration has an associated authentication configuration, the step shows it (configuration name, host, method, and username) in read-only form.	Required
Variables	Displayed only if the selected API configuration defines variables (placeholders entered as `{{variable_name}}` in the path, body, or headers). Enter or update the **Value** for each variable. A blank value resolves to an empty string when the playbook runs.	Optional
Condition to Start Next Step	Select a condition that determines whether the playbook continues to the next step. • **None**: Start the next step even if the API request fails. Selected by default. • **Completed API Execution**: Start the next step only if the API request completes successfully.	Required

Deploy Action

Deploy a specified package to target endpoints.

Tip: To use the **Deploy Action** step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying Actions.

Required solutions

- Tanium Interact

Required permissions

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The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** permission on content sets determine which packages are available for selection in actions
- **Action write** permission on the content sets of packages enables you to deploy actions that use those packages
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.



Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Deploy Action step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional

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Field	Description	Required
Package	Select a package from the dropdown list or enter a search string to find a package by name. You might have to configure additional settings based on your selection. Only packages to which you have permissions appear as options. **Note:** Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, select a different package for the step.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact.	Required

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Field	Description	Required
	The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. The maximum step duration is 720 hours (30 days). After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see the Command Timeout and Download Timeout row in Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified** . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step.	Required

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Field	Description	Required
	If the selected condition is not met, the playbook run ends. **Note:** The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Deploy Software

Use Tanium Deploy to install, update, or remove software packages or bundles on target endpoints.

Note:

The **Deploy Software** step does not support uploading title icons or body images for end user notifications.

The **Deploy Software** step is visible to users without a Tanium license that includes Deploy, but a message explains that the step is not usable because the solution is not installed in their environment.

Tip: To use the **Deploy Software** step, you should have a fundamental understanding of how Tanium Deploy deploys software. For more information, see Tanium Deploy User Guide: Manually deploying software.

Required solutions

- Tanium Deploy

Required permissions

- **Deploy show** permission to view the Deploy Software step

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- **Deploy Settings read** permission to retrieve Deploy settings
- **Deploy Software Package read** permission to view software packages
- **Deploy Software Package Bundle read** permission to view software package bundles
- **Deploy Deployment write** permission on content sets to create deployments, create deployment templates, and perform operations such as stopping and cloning deployments
- **Deploy Software Package execute** permission on content sets to execute software packages
- **Deploy Software Package Bundle execute** permission on content sets to execute software bundles



Note: The **Admin** reserved role and **Deploy Operator** role have all these permissions.

For additional information on Deploy permissions, see Tanium Deploy User Guide: User role requirements.

Fields

For additional information on deploying software, see Tanium Deploy User Guide: Manually deploying software.

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

General

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the	Optional

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Field	Description	Required
	playbook.	
Step Duration	The duration for which this deployment lasts, while acting on targeted endpoints. The default step duration is 24 hours. After the step duration elapses, the deployment ends, and the **Step Completion** criteria is evaluated. The playbook moves on to the next step if the **Step Completion** criteria is met, or ends if the **Step Completion** criteria is not met. **Note:** Define a step duration greater than the **Distribute Over Time** value.	Required
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the software deployment reaches a Complete status with a Success, Success after re-scan, or Success after step error sub-status. A Complete status with a Skipped sub-status, or a Failed or Not Applicable status, is not counted as successful. For the full list of statuses, see Tanium Deploy User Guide: Reference: Deployment status . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends. **Note:** The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the software deployment status at the time of step completion.	Required

Configure Deployment

Section	Description	Required
Deployment	A **Name** for the deployment, an optional **Description** , and the **Content Set** to which the	**Name** and

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Section	Description	Required
Overview	deployment belongs.	**Content Set** are required. **Description** is optional.
Deployment Details	For Software Package, the **Operation** to perform and the **Package** to deploy. For Software Bundle, the **Bundle** to deploy.	For Software Package, **Operation** and **Package** are required. For Software Bundle, **Bundle** is required.
Endpoints to Target	Select an option to refine the targeting. • Targets endpoints from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • All endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Set new target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown.	An endpoint targeting criteria is required.
Deployment Type and Schedule	A one-time deployment with a start time of the playbook run step start time. You can protect shared resources by selecting the **Distribute Over Time** option and indicating an amount of time. The value you indicate for **Distribute Over Time** must be less than the deployment duration. **Distribute Over Time** randomizes the deployment start time on each endpoint by an amount of time up to the value configured. This option reduces concurrent consumption of shared compute	**Distribute Over Time** is optional.

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Section	Description	Required
	resources in a virtual environment, network bandwidth and the WSUS server when using WSUS scan configuration technique, and network bandwidth and the repository server when using the Repository Scan scan configuration technique.	
Deployment Settings	If you want to ignore deployment restrictions, select **Override Maintenance Windows** . Select **Hide from Self Service Client** to hide this deployment from the Self Service Client application, including the **Activity** and **History** sections. Select whether to restart the endpoint after the deployment completes.	All deployment settings are optional.
User Notifications	(Windows endpoints) If you enabled endpoint restarts, you can enable end user notifications about the restarts. If necessary, click Edit and then select **Notify User After Deployment Activity** to configure the following settings. • (Optional) Configure settings that allow the end user to postpone the restart. • Specify the **Message Content** that informs the user about the restart. • (Optional) Select additional languages and provide translated title and body text for endpoints that are configured for other languages. To view the preview in additional languages, toggle the language dropdown list in the preview. You can also use the dropdown list to preview the notification in light or dark theme.	User notifications are optional.

Endpoint Sequence

Run a set of playbook steps concurrently across endpoints, allowing each endpoint to progress based on its own state rather than waiting for other endpoints to finish. Use this step for actions that do not require coordination across endpoints. For example, you might deploy a package that updates a registry key and then deploy a second package that uses that key without waiting for the first package to deploy on another endpoint.

The following child steps are available for **Endpoint Sequence** steps:

- Execute Package on page 243
- Evaluate Endpoint Conditions on page 244
- Restart Endpoints on page 245

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Tip: To use the **Endpoint Sequence** step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying Actions.

Required solutions

- Tanium Interact

Required permissions

The following permissions are required to use endpoint sequences, including action locks:

- **Interact Execute action** permission
- **Package read** permission on content sets determine which packages are available for selection in actions
- **Action write** permission on the content sets of packages enables you to deploy actions that use those packages
- **Action write** permission on the Automate content set enables you to use the actions that trigger the endpoint sequence. This permission is included in the **Playbook write** permission.
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

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Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Endpoint Sequence step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Endpoint Targeting	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact. The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	Required
Distribute Over Duration	The duration to distribute the action that deploys the endpoint sequence.	Optional

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Field	Description	Required
Step Duration	The minimum time Automate waits before evaluating Endpoint Sequence step completion. The actions that trigger the endpoint sequence remain open for this duration. The maximum step duration is 720 hours (30 days). After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the criteria is met, or ends if not. **Note:** Endpoints that pick up the triggering action late might need additional time to run the endpoint sequence and report results. To allow for this, Automate can wait beyond the step duration by up to the sum of the **Command Timeout** values for all packages in the sequence, plus the longest **Download Timeout** among them, plus 5 minutes, for a total wait of at least 30 minutes.	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if every step in the endpoint sequence ran successfully and no **Evaluate Endpoint Conditions** step failed its condition. • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends. **Note:** The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion. **Note:** Endpoint Sequence always waits for all endpoints to leave the Pending state before evaluating this criteria, even if you select **Any** .	Required

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Execute Package

Deliver a specified package to targeted endpoints to deploy an action.

FIELDS

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Execute Package step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	Select a package from the dropdown list or enter a search string to find a package by name. You might have to configure additional settings based on your selection. Only packages to which you have permissions appear as options. **Important:** If you need to restart endpoints, use the Restart Endpoints on page 245 step rather than deploying a package that restarts them.	Required

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Field	Description	Required
	Note: Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, select a different package for the step.	

Evaluate Endpoint Conditions

Define whether targeted endpoints proceed to the next step if the condition is met.

FIELDS

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Evaluate Endpoint Conditions step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the	Optional

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Field	Description	Required
	playbook.	
Meet Condition	Click **Question Criteria** to define conditions that must be met. For example, you can type `Application Crashes Yesterday` in the **Filter Bar** or use the **Filter Builder** to filter endpoints to the results of the Application Crashes Yesterday sensor.	Required

Restart Endpoints

Restart targeted endpoints.

CAUTION: The **Restart Endpoints** step restarts endpoints without warning end users.

FIELDS

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Restart Endpoints step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional

Install Patch

Use Tanium Patch to deploy a software patch to target endpoints. The Install Patch step always creates a one-time deployment. The patch content download and patch deployment both start when

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the Install Patch playbook run step starts. You cannot configure an Install Patch step to create an ongoing patch deployment, configure a start time or end time, or configure patch content downloaded to endpoints prior to the patch deployment start.

Note:

The **Install Patch** step does not support uploading title icons or body images for end user notifications.

The **Install Patch** step is visible to users without a Tanium license that includes Patch, but a message explains that the step is not usable because the solution is not installed in their environment.

Tip: To use the **Install Patch** step, you should have a fundamental understanding of how Tanium Patch deploys patches. For more information, see Tanium Patch User Guide: Deploying patches.

Required solutions

- Tanium Patch 3.16.206 or later

Required permissions

- **Computer Group read** permission
- **Patch Deployment execute** permission
- **Patch Deployment write** permission
- **Sensor read** permission

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Note: The **Administrator** reserved role has all these permissions. Alternatively, create a custom role with the **Computer Group** read permission and one of the following:

- **Patch Administrator** role
- **Patch Deployment Author** role
- **Patch Operator** role
- **Patch Super User** role

For additional information on Patch permissions, see Tanium Patch User Guide: User role requirements.

Fields

For additional information on creating a patch deployment, see Tanium Patch User Guide: Create a deployment to install patches.

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

General

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Step Duration	The duration for which this deployment lasts, while acting on targeted endpoints. The default step duration is 24 hours. After the step duration elapses, the deployment ends, and the **Step Completion** criteria is evaluated. The playbook moves on to the next step if the **Step Completion**	Required

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Field	Description	Required
	criteria is met, or ends if the **Step Completion** criteria is not met. **Note:** Define a step duration greater than the **Distribute Over Time** value.	
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the patch deployment reaches a status of Complete, All Patches Applied. • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends. **Note:** The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the patch deployment status at the time of step completion.	Required

Configure Deployment

Section	Description	Required
Deployment Overview	A **Name** for the deployment, an optional **Description**, an operating system **Platform** for targeted endpoints, and the **Content Set** to which the deployment belongs.	**Name**, **Platform**, and **Content Set** are required. **Description** is optional.

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Section	Description	Required
Deployment Details	For Windows, one or more patch lists, including version, or one or more patches to deploy to targeted endpoints. For Linux, the option to **Install All Updates** ; **Install All Security Updates** ; **Choose Patch List** , including version; or **Manually Select Patches** .	For Windows, at least one patch or patch list is required. For Linux, a patch option is required.
Endpoints to Target	Select an option to refine the targeting. • Targets endpoints from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • All endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Set new target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown.	An endpoint targeting criteria is required.
Deployment Type and Schedule	A one-time deployment with a start time of the playbook run step start time. You can protect shared resources by selecting the **Distribute Over Time** option and indicating an amount of time. The value you indicate for **Distribute Over Time** must be less than the deployment duration. **Distribute Over Time** randomizes the deployment start time on each endpoint by an amount of time up to the value configured. This option reduces concurrent consumption of shared compute resources in a virtual environment, network bandwidth and the WSUS server when using WSUS scan configuration technique, and network bandwidth and the repository server when using the Repository Scan scan configuration technique.	**Distribute Over Time** is optional.
Deployment Settings	If you want to ignore patching restrictions, select **Override Maintenance Windows** or **Override Block Lists** . Select **Hide from Self Service Client** to hide this deployment from the Self Service Client application, including the **Activity** and **History** sections.	All deployment settings are optional.

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Section	Description	Required
	Select whether to restart the endpoint after the patch deployment completes.	
User Notifications	(Windows endpoints) If you enabled endpoint restarts, you can enable end user notifications about the restarts. If necessary, click Edit and then select **Notify User After Deployment Activity** to configure the following settings. • (Optional) Configure settings that allow the end user to postpone the restart. • Specify the **Message Content** that informs the user about the restart. • (Optional) Select additional languages and provide translated title and body text for endpoints that are configured for other languages. To view the preview in additional languages, toggle the language dropdown list in the preview. You can also use the dropdown list to preview the notification in light or dark theme.	User notifications are optional.

Manual Instruction

Provide instructions for a Tanium operator to manually complete. The intended Tanium operator must have permissions to access the playbook run. The Tanium operator must complete the instructions and then confirm the completion of the step to allow the playbook to proceed to the next step.

Required solutions

The **Manual Instruction** step does not require any additional Tanium solutions.

Required permissions

No additional permissions are required to add this step.

The Tanium operator completing the step needs the **Automate Playbook execute** permission.

Fields

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Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Manual Instruction step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a user views the playbook.	Optional
Instructions	Provide instructions for the Tanium operator to follow. The Tanium operator can view the instructions when viewing the playbook run.	Required

Reboot Non-Windows Machine

Deploy the **Reboot Non-Windows Machine** package to target endpoints managed using Tanium Client that are not running Windows, such as Linux or macOS. The package reboots the endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission

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- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.



Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Reboot Non-Windows Machine step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Reboot Non-Windows Machine** package.	Read-only

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Field	Description	Required
	Note: Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Type REBOOT in the box to confirm you wish to reboot all targeted machines	Enter `REBOOT`.	Required
Random Reboot Delay (seconds)	Enter a number of seconds to randomize the reboot start time on each endpoint by an amount of time up to the value configured. This option reduces concurrent consumption of shared compute resources in a virtual environment and protects shared resources.	Optional
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups.	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The	Required

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Field	Description	Required
	previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact. The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified** . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step.	Required

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Field	Description	Required
	• **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends. **Note:** The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Reboot Windows Machine

Deploy the **Reboot Windows Machine** package to target Windows endpoints, which reboots the endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

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- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.



Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Reboot Windows Machine step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Reboot Windows Machine** package.	Read-only

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Field	Description	Required
	 **Note:** Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Type REBOOT in the box to confirm you wish to reboot all targeted machines	Enter `REBOOT`.	Required
Reboot Only If Windows Requires It	Select `yes` to reboot a targeted endpoint if Windows requires a reboot to complete a process, such as completing a patch installation. Select `no` to reboot all targeted endpoints.	Required
Random Reboot Delay (seconds)	Enter a number of seconds to randomize the reboot start time on each endpoint by an amount of time up to the value configured. This option reduces concurrent consumption of shared compute resources in a virtual environment and protects shared resources.	Optional
Action	Select the action group to target for the action. For more information about action groups, see	Required

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Field	Description	Required
Group	Tanium Console User Guide: Managing action groups .	
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact. The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	Required
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs.	Required

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Field	Description	Required
Next Step	An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified**. • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends. **Note:** The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Remove Custom Tag (Non-Windows)

Deploy the **Custom Tagging - Remove Tags (Non-Windows)** package to target endpoints managed using Tanium Client that are not running Windows, such as Linux or macOS. The package removes one or more custom tags from targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content

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- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.



Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Remove Custom Tag (Non-Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional

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Field	Description	Required
Package	The **Custom Tagging - Remove Tags (Non-Windows)** package. **Note:** Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	Read-only
Custom Tags	Enter a space-delimited list of string values to remove as custom tags. **Note:** If you want to remove a tag that contains a space character, you must use the `#|#` character sequence as a delimiter.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click	Required

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Field	Description	Required
	Question Criteria and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact. The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends.  **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified** . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step.	Required

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Field	Description	Required
	If the selected condition is not met, the playbook run ends. **Note:** The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Remove Custom Tag (Windows)

Deploy the **Custom Tagging - Remove Tags (Windows)** package to target Windows endpoints, which removes one or more custom tags from targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

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Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Remove Custom Tag (Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Custom Tagging - Remove Tags (Windows)** package.	Read-only

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Field	Description	Required
	Note: Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Custom Tags	Enter a space-delimited list of string values to remove as custom tags. **Note:** If you want to remove a tag that contains a space character, you must use the `#|#` character sequence as a delimiter.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target.	Required

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Field	Description	Required
	For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact. The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout**. If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout.	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified**. • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends.	Required

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Field	Description	Required
	Note: The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Require User Confirmation

Require a Tanium operator to confirm that the playbook can proceed to the next step.

Required solutions

The **Require User Confirmation** step does not require any additional Tanium solutions.

Required permissions

No additional permissions are required to add this step.

The Tanium operator completing the step needs the **Automate Playbook execute** permission.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Require User Confirmation step

Field	Description	Required
Step Name	The name of the step. The name appears when you view the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook or a playbook run.	Optional

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Field	Description	Required
Instructions	Provide instructions for the Tanium operator to follow. The Tanium operator can view the instructions when viewing the playbook run.	Optional

Restart Service (Non-Windows)

Deploy the **Restart Service [Non-Windows]** package to target endpoints managed using Tanium Client that are not running Windows, such as Linux or macOS. The package restarts a specified service on targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

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Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Restart Service (Non-Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Restart Service [Non-Windows]** package.	Read-only

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Field	Description	Required
	 **Note:** Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Service Name	Enter the name of the service to restart.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact.	Required

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Field	Description	Required
	The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified** . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends.	Required

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Field	Description	Required
	Note: The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Restart Service (Windows)

Deploy the **Restart Service** package to target Windows endpoints. The package restarts a specified service on targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

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Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Restart Service (Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Restart Service** package.	Read-only

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Field	Description	Required
	 **Note:** Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Service Name	Enter the name of the service to restart.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact.	Required

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Field	Description	Required
	The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified** . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends.	Required

Field	Description	Required
	Note: The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Ring Deployment

Use a ring deployment plan to run child steps against endpoints in sequential rings. You can add **Deploy Action**, **Wait**, **Verify Condition**, **Require User Confirmation**, or **Manual Instruction** steps inside the **Ring Deployment** step to define the actions that run against each ring. The step advances to the next ring after all child steps complete and the progression criteria defined in the deployment plan are met.

Required solutions

The **Ring Deployment** step does not require any additional Tanium solutions.

Required permissions

To add a **Ring Deployment** step, you must have one of the following roles:

- **Deployment Plan User** or **Deployment Plan Editor** role

For more information, see Set up Automate users on page 35.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

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Fields for the Ring Deployment step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Endpoint Targeting	Select an option to define the initial set of endpoints to target across all rings: • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target.	Required
Ring Deployment Plan	Select a deployment plan to run the playbook steps with. The deployment plan defines the ring structure, per-ring endpoint targeting, and the progression criteria that must be met before the step advances to the next ring. Only deployment plans to which you have permissions appear as options.	Required

Run a Tanium Connection

Run a Tanium Connect connection as a step in a playbook. Use this step to run a configured connection that sends data from a source to a destination, such as sending saved question results to an email address or an external system.

Tanium Connect does not support running the same connection as multiple concurrent instances. If a playbook step attempts to run a connection that is already running, the step fails. You can run the step again after the in-progress connection run completes.

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Note: The **Run a Tanium Connection** step is visible to users without Tanium Connect installed, but a message explains that the step is not usable because the solution is not installed in their environment.

Tip: To use the **Run a Tanium Connection** step, you should have a fundamental understanding of Tanium Connect connections. For more information, see Tanium Connect User Guide.

Required solutions

- Tanium Connect

Required permissions

The following permissions are required to add and run a **Run a Tanium Connection** step:

- **Connect read** permission to view available connections
- **Connect run** permission to run connections

Note: The **Administrator** reserved role and **Connect Operator** role have all of these permissions.

For more information about Connect permissions, see Tanium Connect User Guide: User role requirements.

Fields

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Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Run a Tanium Connection step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Connection	Select the Connect connection to run. Only connections to which you have permissions appear as options. To create a connection, click **+ Create New Connection** . For more information about creating connections, see Tanium Connect User Guide: Creating connections .	Required
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. • **None**: Start the next step after the connection run begins. • **Completed Connection Run**: Start the next step after the connection run finishes. If the connection run does not complete successfully, the playbook run ends.	Required

Set Service Start Mode (Windows)

Deploy the **Service - Set Start Mode** package to target Windows endpoints, which changes the start mode of a specified service.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content

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- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.



Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Set Service Start Mode (Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional

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Field	Description	Required
Package	The **Service - Set Start Mode** package. **Note:** Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	Read-only
Start Mode	Select the start mode to set for the service. The following options are available: • **Automatic**: Starts at boot, before user login. Use to ensure a service is always running after a reboot step. • **Automatic-Delayed**: Starts at boot, approximately 2 minutes after automatic services finish. Use when the service doesn't need to be available immediately on startup. • **Manual**: Only starts when explicitly triggered. Use when you want the service available on demand but not consuming resources at boot. • **Disabled**: Cannot start until the mode is changed. Use to prevent a service from running on targeted endpoints.	Required
Service Name	Enter the name of the service to configure.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The	Required

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Field	Description	Required
	previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact. The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout**. If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout.	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified**. • **None**: The playbook continues to the next step even if no endpoints successfully complete this step.	Required

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Field	Description	Required
	• **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends. **Note:** The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Start Service (Non-Windows)

Deploy the **Start Service [Non-Windows]** package to target endpoints managed using Tanium Client that are not running Windows, such as Linux or macOS. The package starts a specified service on targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

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- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.



Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Start Service (Non-Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Start Service [Non-Windows]** package.	Read-only

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Field	Description	Required
	Note: Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Service Name	Enter the name of the service to start.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact.	Required

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Field	Description	Required
	The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends.  **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified** . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends.	Required

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Field	Description	Required
	Note: The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Start Service (Windows)

Deploy the **Start Service** package to target Windows endpoints. The package starts a specified service on targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

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Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Start Service (Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Start Service** package.	Read-only

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Field	Description	Required
	 **Note:** Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Service Name	Enter the name of the service to start.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact.	Required

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Field	Description	Required
	The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends.  **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified** . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends.	Required

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Field	Description	Required
	Note: The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Stop Service (Non-Windows)

Deploy the **Stop Service [Non-Windows]** package to target endpoints managed using Tanium Client that are not running Windows, such as Linux or macOS. The package stops a specified service on targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

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Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Stop Service (Non-Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Stop Service [Non-Windows]** package.	Read-only

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Field	Description	Required
	 **Note:** Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Service Name	Enter the name of the service to stop.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact.	Required

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Field	Description	Required
	The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends.  **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified** . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends.	Required

Field	Description	Required
	Note: The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Stop Service (Windows)

Deploy the **Stop Service** package to target Windows endpoints. The package stops a specified service on targeted endpoints.

Tip: This step extends the Deploy Action step for a specific package. To use this step, you should have a fundamental understanding of actions and action deployment. For more information, see Tanium Console User Guide: Deploying actions in Console and Interact.

Required solutions

- Tanium Core Content
- Tanium Interact

Required permissions

The following permissions are required to deploy actions, including action locks:

- **Interact Execute action** permission
- **Package read** and **Action write** permissions are required on the **Core Content** content set
- **Sensor read** and **Saved Question read** permissions are required on the **Reserved** content set. The Tanium Server uses special saved questions to track and report action status within the deploy action workflow. Therefore, these permissions are required to complete the action deployment workflow.

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Note: The **Administrator** reserved role, **Content Administrator** reserved role, and **Interact Power User** role have all these permissions.

For more information, see Tanium Console User Guide: Action management permissions.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Stop Service (Windows) step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Package	The **Stop Service** package.	Read-only

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Field	Description	Required
	 **Note:** Playbook steps store their own snapshot of the package. If the source package is updated or deleted, a warning banner appears stating the package is out of sync with its source. The step continues to use its snapshot. One of the following applies: • If a newer version of the package is available, click **Update Package** to switch to it. Parameter values carry over automatically where the parameter name and type match the new version. Parameters that were removed or changed are flagged for you to review. Click **View Source Package** to open the current version of the package in a new tab. • If the package is deleted, this field does not let you select a different package.	
Service Name	Enter the name of the service to stop.	Required
Action Group	Select the action group to target for the action. For more information about action groups, see Tanium Console User Guide: Managing action groups .	Required
Target	Select an option to refine the targeting. • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. Click **Question Criteria** and enter a question that returns the endpoints you want this step to target. For more information about working with question results, see Tanium Interact User Guide: Managing question results in Interact.	Required

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Field	Description	Required
	The Tanium Server applies a Boolean AND to the **Action Group** and **Target** options that you specify. For this step to target an endpoint, the endpoint must be contained in both the **Action Group** and any **Target** option.	
Step Duration	The duration for which this step lasts, while acting on targeted endpoints. After the step duration elapses, and no more endpoints are in a **Pending** state or a timeout occurs, the **Condition to Start Next Step** criteria is evaluated. The playbook moves on to the next step if the **Condition to Start Next Step** criteria is met, or ends if the **Condition to Start Next Step** criteria is not met. If you select **Any** as the **Step Completion** option for the **Condition to Start Next Step** criteria, then the playbook continues to the next step as soon as one endpoint completes this step, even if others are still pending. The evaluation still occurs after the step duration ends. **Note:** If you do not define a step duration, the step uses the minimum step duration for the package, which is the sum of the package **Command Timeout** and package **Download Timeout** . If you do not define a step duration, and the sum of the **Command Timeout** and **Download Timeout** is less than 60 seconds, the playbook ends unless the **Step Completion** criteria is met within 10 minutes after the step duration elapses. For more information, see Tanium Console User Guide: Command Timeout and Download Timeout .	Optional
Condition to Start Next Step	Select a condition to determine if the playbook continues to the next step. Evaluation occurs after the selected **Step Duration** elapses, and no more endpoints are in a Pending state or a timeout occurs. An endpoint successfully completes this step if the package **Action Status** is **Completed** or **Verified** . • **None**: The playbook continues to the next step even if no endpoints successfully complete this step. • **Minimum Endpoints**: One or more endpoints must successfully complete this step. • **All**: All targeted endpoints must successfully complete this step. • **Any**: At least one endpoint must successfully complete this step. • **Percent**: Enter a percentage of the targeted endpoints that must successfully complete this step. If the selected condition is not met, the playbook run ends.	Required

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Field	Description	Required
	Note: The playbook only proceeds to the next step when the completion condition is met. The endpoint results after the step completes reflect the action deployment status at the time of step completion.	

Verify Condition

Define a condition that endpoints must meet to allow the playbook to proceed to the next step. The step is considered complete when 95% of endpoints have responded, or after ten minutes elapse. After step completion, if the condition is not true, the condition fails and the playbook run stops.

Required solutions

The **Verify Condition** step does not require any additional Tanium solutions.

Required permissions

No additional permissions are required to add this step.

Fields

Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Verify Condition steps

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional

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Field	Description	Required
Target Endpoints	Select endpoints to target: • Targets from previous step: Target the endpoints defined in the previous targeting step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • Endpoints that completed the previous step successfully: Target the endpoints defined in the previous targeting step that successfully completed the previous step. The previous targeting step does not need to immediately precede this step. This option is only available if there is a previous targeting step in the playbook. • New Target: Click **Computer Groups** and select the computer groups that you want this step to target. Only computer groups that are accessible to the current user and persona are shown. **Note:** Playbook steps cannot inherit targeting from a **Verify Condition** step. If you select **Targets from previous step** or **Endpoints that completed the previous step successfully** for a step target, and the prior step is a **Verify Condition** step, the endpoint targeting is instead inherited from the next valid step prior to the **Verify Condition** step. If the first playbook step is a **Verify Condition** step, you must define new endpoint targeting for a subsequent step because the step cannot inherit targeting from the **Verify Condition** step.	Required
Meet Condition	Click **Build Question** to define a filter using the same **from computers with** fields as in the Interact **Question Builder**. For more information, see Tanium Console User Guide: Issue a question through the Question Builder.	Required

Wait

Specify a duration to wait for the next step to start after the prior step completes.

Required solutions

The **Wait** step does not require any additional Tanium solutions.

Required permissions

No additional permissions are required to add this step.

Fields

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Tip: You can configure field parameters for some fields in a step. Then, when users run the playbook, they can review and update the parameter values. To configure field parameters, select **Parameter**. You can also provide a description to help users determine a value to use when running the playbook. For more information, see Configure playbook field parameters on page 41.

Fields for the Wait step

Field	Description	Required
Step Name	The name of the step. The name appears when a Tanium operator views the playbook.	Required
Description	An optional description for the step. The description appears when a Tanium operator views the playbook.	Optional
Duration	Select a duration to wait. You can specify a value in minutes, hours, or days. When the step processes, the duration is based on the start time (and not the calendar) to avoid conflicts with time zones and daylight saving time. The maximum wait duration is seven days.	Required

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