Tanium Trends User Guide

2026H2 Semiannual Release

Version 3.12

November 19, 2026



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Trends overview

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

Use Trends to gain insight into key security metrics and operational health by creating visualizations that show current and historical data from endpoints.

Features

Use Trends to:

- Record metrics from saved questions and installed Tanium solutions over time.
- Visualize trends and states in the environment, split by computer groups.
- Display alerts when thresholds are breached.
- Create a schedule to automatically deliver reports to stakeholders.

Concepts

You must understand the following primary concepts to use Trends:

- Sources on page 8
- Panels on page 9
- Boards on page 9

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Sources

A *source* is a configuration that defines where data originates. In Trends, sources provide data to build charts. The two types are saved question sources and module sources.

> **Note:** For procedures related to sources, see Working with sources on page 38.

Saved question sources

A *saved question source* is a configuration that defines a Trends saved question, how often to issue the question, and when to collect results from the endpoints. Every source issues its saved question to all computer groups visible to Trends.

Trends contains an initial gallery that includes Trends boards that are based on sample saved question sources. You can edit these saved question sources, create your own, and delete saved question sources. For more information on the initial gallery, see Importing the initial gallery on page 34.

When you create a saved question source, Trends creates a saved question that is named after the source and has the string `Trends` prepended. For example, if the name of the source is **Chassis Type**, the name of the saved question is **Trends Chassis Type**. With this convention, you can easily filter for Trends questions in the saved questions and question history tables in Tanium™ Console.

> **Important:** A Trends saved question can ask for results from only one sensor. The sensor can be a single column sensor, a multi-column sensor, or a parameterized sensor.

Module sources

A *module source* is a configuration that defines data that a Tanium solution provides to Trends. Data can include metrics, such as counts of events. The module source validates and aggregates data that the solution provides. Module sources are created when you import a Tanium solution. You cannot create or edit module sources, but you can disable them to stop data from being stored. Access permissions for the solution that provides the data control access to module sources.

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Panels

A *panel* contains a visualization for data collected by a source. When you create or edit a panel, select the source to use and the default computer group for which to show data. When a saved question source uses a multicolumn sensor, you can choose which column to display. You can also customize the chart type, date range, color scheme, and more.

Panels depend on sources; you must create a saved question source or select a module source before you create a panel that uses the source.

For more information on how to add panels to a board, see Building and publishing boards on page 46. For more information on how to use panels, see Viewing chart results on page 58.

Boards

A *board* organizes a collection of panels. You can create and edit boards to add panels, and you can publish boards to downloadable HTML files.

For more information about how to create, edit, and publish boards, see Building and publishing boards on page 46.

Interoperability with other Tanium products

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

Tanium™ Connect

Configure a Connect destination to export Trends boards outside of Tanium. You can export a board to a file, or email a board as an attachment.

Trends boards that other solutions provide

The following solutions provide boards that you can access through the initial gallery in Trends:

- Asset
- Client Management

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- Comply
- Connect
- Containers
- Deploy
- Discover
- Enforce
- Impact
- Integrity Monitor
- Patch
- Performance
- Reputation
- Reveal
- Threat Response

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Gaining organizational effectiveness with Trends

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

The three key organizational governance steps to maximizing the value that is delivered by Trends are as follows:

- Develop a dedicated change management process. For more information, see Change management on page 11.
- Validate cross-functional alignment. For more information, see Organizational alignment on page 12.
- Track operational maturity. For more information, see Operational metrics on page 12.

Change management

Develop a tailored, dedicated change management process for data visualizations, taking into account the new capabilities provided by Tanium.

- Update SLAs with elevated expectations, including data visualization configuration and maintenance.
- Identify key resources in the organization to review and approve changes to data visualizations to ensure minimal unexpected or unapproved changes.
- Identify maintenance windows for various data visualization scenarios to maximize uptime.

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- Create a Tanium steering group (TSG) for data visualization activities, to expedite reviews and approvals of processes that align with SLAs.

Organizational alignment

Successful organizations use Tanium across functional silos as a common platform for high-fidelity endpoint data and unified endpoint management. Tanium provides a common data schema that enables security, operations, and risk/compliance teams to assure that they are acting on a common set of facts that are delivered by a unified platform.

In the absence of cross-functional alignment, functional silos often spend time and effort in litigating data quality instead of making decisions to increase awareness of data visualizations at all levels of the organization.

Operational metrics

Trends maturity

Managing data visualizations successfully includes operationalization of the technology and measuring success through key benchmarking metrics. The four key processes to measure and guide operational maturity of your Tanium Trends program are as follows:

Key processes

Process	Description
Usage	How and when Tanium Trends is used in your organization
Automation	How automated Tanium Trends is
Functional Integration	How integrated Tanium Trends is, across IT security, IT operations, and IT risk/compliance teams
Reporting	How automated Tanium Trends is and who the audience of data visualizations is

Use the following table to determine the maturity level for Tanium Trends in your organization.

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Maturity levels

		Level 1 (Initializing)	Level 2 (Progressing)	Level 3 (Intermediate)	Level 4 (Mature)	Level 5 (Optimized)
Process	Usage	Tanium Core Platform and Trends installed	Trends boards, panels, and sources created and in use	Tanium administrators rely on Trends boards to monitor health of environment, investigate and take action	Multiple boards in use to track organization key performance indicators, set goals, and strategic initiatives New sources created as standard operating procedure to important upgrades, vulnerabilities, events, and incidents	Custom sensors or modify an existing sensor specifically for use as a Trends source are in use Custom RBAC roles and content sets to restrict access to boards and sources
	Automation	Tanium module boards automatically imported into Trends	Creating sources to track key results and metrics over time	Use Connect to periodically publish and email Trends boards to major stakeholders	Conditional and advanced formatting to prioritize further investigation and action	Conditional and advanced formatting to prioritize further investigation and action
	Functional integration	Trends is functionally siloed within Operations and Security	Utilizing Trends for basic reporting and actions	Exporting to internal systems for reporting and actions; end-users access to Trends to access dashboards	Utilizing Trends imports and exports to move boards, panels, and sources between Tanium environments	Utilize Trends API to publish Trends boards to an internal portal (optional)
	Reporting	Unused	Ad hoc; Tanium administrators	Consistent; Reporting tailored to stakeholders on cadence	Automated; Reporting tailored to stakeholders ranging from Operator to	Automated; Reporting tailored to stakeholders

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		Level 1 (Initializing)	Level 2 (Progressing)	Level 3 (Intermediate)	Level 4 (Mature)	Level 5 (Optimized)
					Executive	ranging from Operator to Executive

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Getting started with Trends

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

Step 1: Install and configure Trends

For more information, see Installing Trends on page 25 and Configuring Trends on page 29.

If you are upgrading from a previous version, see Upgrading Trends on page 32.

Step 2: Import the initial gallery

Import the initial gallery and explore the built-in sources, boards, and panels. For more information, see Importing the initial gallery on page 34.

Step 3: Create sources

Create your own saved question sources. For more information, see Working with sources on page 38.

Step 4: Create boards

Create and publish your own boards and panels. For more information, see Building and publishing boards on page 46.

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Trends requirements

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

Review the requirements before you install and use Trends.

Core platform dependencies

Trends requires Tanium™ Core Platform.

Solution dependencies

Other Tanium solutions are required for Trends to function (required dependencies) or for specific Trends 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 Trends dependencies have their own dependencies, which you can see by clicking the links in the lists of Required dependencies on page 17 and Feature-specific dependencies on page 17. Note that the links open the user guides for the latest version of each solution, not necessarily the minimum version that Trends requires.

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Tanium recommended installation

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

Import specific solutions

If you select only Trends to import, you must manually import dependencies. For more information, see Tanium Console User Guide: Import or update specific solutions.

Required dependencies

Trends has the following required dependencies:

- Tanium license that includes Trends. For more information about how to get Trends, see Tanium Solutions & Bundles.
- Tanium™ Interact
- Tanium™ Data Service (TDS)
- Tanium™ RDB Service

Feature-specific dependencies

Trends has the following feature-specific dependencies:

- The initial gallery uses sensors that are included in Tanium modules, Tanium shared services, the Tanium™ Core Content pack, and the Tanium™ Default Content pack. If this content is not present when you import the gallery, the corresponding sources, boards, panels, and sections are not created.
- Tanium™ Reporting to migrate Trends boards to Reporting.

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Tanium™ Module Server

Trends installs and runs as a service on the Module Server. The impact on Module Server sizing is minimal and depends on usage. Contact Tanium Support on page 83 for details.

Endpoints

Trends does not deploy packages to endpoints. For a list of the supported operating systems for Tanium™ Clients, 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 Trends.

Ports

The following ports are required for Trends communication.

Port requirements

Source	Destination	Port	Protocol	Purpose
Module Server	Module Server (loopback)	17452	TCP	Internal purposes, not externally accessible
	Module Server (loopback)	17462	TCP	Internal purposes, not externally accessible

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

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Security exclusions

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

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

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

Target Device	Notes	Exclusion Type	Exclusion
Module Server		Process	<Module Server>\services\twsm-v1\twsm.exe
	Required only during upgrade from Trends 3.8 and earlier	Process	<Module Server>\services\trends\node_modules\@tanium\postgresql\lib\win32\bin\postgres.exe
	Required only during upgrade from Trends 3.8 and earlier	Process	<Module Server>\services\trends\node_modules\@tanium\postgresql\lib\win32\bin\pg_ctl.exe

User role requirements

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

- Trends administration and platform content permissions on page 23: The solution permissions automatically provide some of these permissions.

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- Content sets on page 23

To review a summary of the predefined roles, see Set up Trends users on page 30.

Some Trends 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 Trends. If you create custom roles for Trends users, be sure to assign all the solution permissions and content set permissions that are required for Trends functionality. If you are not sure which permissions are required for a custom role, view the permissions of the predefined roles. For more information, see the following sections of the Tanium Console User Guide:

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

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

Trends user role permissions

Permission	Trends Administrator [1]	Trends Author [1]	Trends Board Author	Trends Board Viewer	Trends Operator [1]
Trends [2] SHOW: Access to the Trends workbench. EXPORT: Export board and source configurations in JSON format. Migrate boards and sources to Tanium Reporting. IMPORT: Import from file or gallery. Does not grant access to create new or custom boards and sources. PUBLISH: Generate and publish reports.	✓ SHOW	✓ SHOW EXPORT IMPORT PUBLISH	✓ SHOW PUBLISH	✓ SHOW	✓ SHOW EXPORT IMPORT PUBLISH

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Permission	Trends Administrator [1]	Trends Author [1]	Trends Board Author	Trends Board Viewer	Trends Operator [1]
Trends Administrator Unrestricted access to all Trends content, actions, and workbench	✓ ADMINISTER	✗	✗	✗	✗
Trends API Board [3] View, create, edit, or delete boards, sections, and panels for specified content sets	✗	✓ READ WRITE	✓ READ WRITE	✓ READ	✓ READ WRITE
Trends API Source [3] View, create, edit, or delete sources for specified content sets	✗	✓ READ WRITE	✓ READ	✗	✓ READ WRITE
Trends Board (deprecated) View, create, edit, or delete boards, sections, and panels **Note:** In Trends 3.0 and later, use the **Trends API Board**, **Trends** show, and **Trends Data** permissions instead	✗	✓ READ WRITE	✓ READ WRITE	✓ READ	✗
Trends Data [3] Run data queries against sources	✗	✓ READ	✓ READ	✓ READ	✓ READ
Trends Integration Service Account [3] Provides access for module service accounts to read and write data, and to define sources and boards	✗	✗	✗	✗	✗
Trends Operator Read Saved View and list boards, sections, and panels in the Trends content sets	✗	✗	✗	✗	✓ QUESTION
Trends Operator Settings Access to some module-level settings for	✗	✗	✗	✗	✓

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Permission	Trends Administrator [1]	Trends Author [1]	Trends Board Author	Trends Board Viewer	Trends Operator [1]
Trends (excludes setting service credentials)					WRITE
Trends Service Account Provides access for the Trends service account to read and write data, and to define sources and boards	✗	✗	✗	✗	✗
Trends Settings Access to module-level settings for Trends	✗	✗	✗	✗	✗
Trends Source (deprecated) [2,4] View, create, edit, or delete sources **Note:** In Trends 3.0 and later, use the **Trends API Source**, Trends show, and **Trends Data** permissions instead	✗	✓ READ WRITE	✓ READ	✗	✗
Trends View Recent [5] View recent saved question results on the panel page	✗	✓ RESULTS	✓ RESULTS	✓ RESULTS	✓ RESULTS

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

[2] Requires content set permissions for the sensors that Trends uses.

[3] Denotes a permission that determines access to content sets.

[4] Module sources require administrator access.

[5] Requires **Sensor** read permission for the content set that contains the sensor used by a source. To view recent results for all sources, you need access to all content sets that contain sensors used by sources.

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Trends administration and platform content permissions

Permission	Permission Type	Trends Administrator	Trends Author	Trends Board Author	Trends Board Viewer	Trends Operator
Client Status	Administration	✗	✗	✗	✗	✗
Computer Group	Administration	✓ READ	✗	✗	✗	✓ READ
Server Status	Administration	✗	✗	✗	✗	✗
Plugin	Platform Content	✓ READ EXECUTE	✓ READ EXECUTE	✓ READ EXECUTE	✓ READ EXECUTE	✓ READ EXECUTE
Saved Question	Platform Content	✓ READ	✓ READ	✓ READ	✓ READ	✓ READ
Sensor	Platform Content	✗	✗	✗	✗	✗

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

Content sets

All boards, sources, and saved questions must be assigned to a content set. The following table shows the predefined content sets. You can create your own content sets in addition to these content sets.

Trends content sets

Content set	Description	Predefined roles with access
Trends	Default content set for Trends boards, sources, and saved questions.	• Trends Administrator[1]

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Content set	Description	Predefined roles with access
		• Trends Author • Trends Board Author • Trends Board Viewer • Trends Operator
Trends Unassigned Content	Trends boards, sources, and saved questions whose content set is deleted. Read-only.	• Trends Administrator • Trends Operator
Trends Service	Trends internal service content. Read-only.	• Trends Administrator • Trends Operator

[1] Users with the **Trends Administrator** role can access Trends boards and sources in any content set, but can only access Trends saved questions in the prebuilt content sets (Trends, Trends Service, and Trends Unassigned Content).

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Installing Trends

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

Use the Tanium Console **Solutions** page to install Trends and choose between automatic and manual configuration:

- **Automatic configuration with default settings**: Trends 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 Trends, see Import Trends with default settings on page 26.
- **Manual configuration with custom settings**: After installing Trends, you must manually configure required settings. Select this option only if Trends requires settings that differ from the recommended default settings. For more information, see Import Trends with custom settings on page 26.

Before you begin

- Read the Release notes.
- Review the Trends requirements on page 16.
- If you are upgrading from a previous version, see Upgrading Trends on page 32.
- Assign the correct roles to users for Trends. Review the User role requirements on page 19. To

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import the Trends solution, you must be assigned the Administrator reserved role.

Import Trends with default settings

About this task

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

Default settings

Setting	Default value
Trends visibility	Trends visibility is set to the following computer groups if they exist: • `All Computers` • `All Windows` • `All Linux` • `All Mac` • `All Workstations` • `All Servers` • `All Windows Workstations` • `All Windows Servers`
Trends boards	Trends imports all available boards and sources for the initial gallery. This includes boards and sources provided by any other Tanium solution that has a service account configured. After import, boards might take several minutes to initially display. **Note:** If you import Trends with the default settings and later import another Tanium solution, Trends automatically imports the boards and sources for that solution. If you import Trends without the default settings, you must manually import the boards and sources from other Tanium solutions. For more information, see Importing the initial gallery on page 34 .

To import Trends 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 Trends version on page 27.

Import Trends with custom settings

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About this task

To import Trends 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: see Verify Trends version on page 27.

To configure visibility groups, see Configure visibility groups on page 29.

Manage solution dependencies

About this task

When you start the Trends workbench for the first time, the Tanium Server checks whether all the Tanium modules and shared services (solutions) that are required for Trends are installed at the required versions. The Trends workbench cannot load unless all required dependencies are installed. If you selected **Tanium Recommended Installation** when you imported Trends, the Tanium Server automatically imported all your licensed solutions at the same time. Otherwise, if you manually imported Trends and did not import all its dependencies, Tanium Console displays a banner that lists the dependencies and the required versions. For more information, see Solution dependencies.

Perform the following steps if a banner indicates any Trends dependencies are not installed:

1. Install the dependencies as described in Tanium Console User Guide: Import or update specific solutions.
2. From the Main menu, go to **Modules** > **Trends** to open the Trends **Overview** page and verify that Console no longer displays a banner to list missing dependencies.

Verify Trends version

About this task

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

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

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What to do next

- If you imported Trends without automatic settings, import the initial gallery on page 34.
- Explore the built-in sources, boards, and panels contained in the initial gallery.

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Configuring Trends

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

If you installed Trends with the **Apply All Tanium recommended configurations** option, Trends has the default settings described in Import Trends with default settings on page 26. Otherwise, you must manually configure visibility groups (see Configure visibility groups on page 29) and import the boards and sources from other Tanium solutions (see Importing the initial gallery on page 34).

Configure visibility groups

About this task

Select the computer groups from which you want Trends to collect data. When Trends collects results from saved question sources, the results are split into aggregate count records by the selected computer groups. You can change your selections at any time. Users require explicit computer group permissions to view data for the corresponding computer groups.

Note: For more information about managing computer groups and the associated role permissions, see Tanium Console User Guide: Managing computer groups.

1. From the Main menu, go to **Modules** > **Trends** > **Overview** and click Settings **> Groups**.
2. Select (include in collection) or clear (exclude from collection) computer groups, go to the end of the grid, and click **Submit**.

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Set up Trends users

About this task

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

To review specific permissions for each role, see User role requirements on page 19.

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

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

Trends Administrator

Assign the **Trends Administrator** role to users who manage the configuration of Trends. This role has unrestricted access to all actions and content in Trends.

Trends Operator

Assign the **Trends Operator** role to users who manage the configuration of Trends but do not need to manage the service account. This role has unrestricted access to all actions and content in Trends.

Trends Author

Assign the **Trends Author** role to users who create or edit boards and sources. This role can perform the following tasks:

- View, create, edit, or delete boards
- View, create, edit, or delete sources
- Export or import boards and sources
- Publish reports from boards

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Trends Board Author

Assign the **Trends Board Author** role to users who create or edit boards. This role can perform the following tasks:

- View, create, edit, or delete boards
- View sources
- Publish reports from boards

Trends Board Viewer

Assign the **Trends Board Viewer** role to users who view boards in Trends.

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

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Upgrading Trends

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

If you installed a previous version of Trends, make sure to complete all required upgrade activities.

Before you begin

Note: In Trends 3.x and later, all boards, sources, and saved questions must have a content set assignment. When you upgrade from a Trends 2.x installation, any existing boards and saved question sources are assigned to the predefined **Trends** content set. All users with predefined Trends roles can access the **Trends** content set. Any custom roles that were created before the upgrade to Trends 3.x also retain their previous Trends permissions for the **Trends** content set.

- Read the release notes.
- Review the Trends requirements on page 16.

Upgrade Trends

For the steps to upgrade Trends, see Tanium Console User Guide: Install a Tanium release update.

What to do next

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- Verify that the correct version is installed: see Verify Trends version on page 27.
- Reimport the initial gallery on page 34 to import any new boards, panels, and sources.
- You may also want to review the boards and sources in Trends and assign them to different content sets to control access. For more information about predefined content sets in Trends, see Content sets on page 23. For more information about how to use Tanium RBAC to control access to content, see Tanium Console User Guide: RBAC overview.

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Importing the initial gallery

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

Trends contains a predefined gallery of boards, panels, and sources. The gallery includes:

- Trends boards that use sensors from the Tanium™ Core Content and Tanium™ Default Content packs to provide environmental visibility.
- Boards for any installed Tanium solutions that use module sources or saved question sources. For example, if Tanium™ Discover is installed, you can import a Discover gallery that contains predefined boards, panels, and sources that use Discover-provided data.

Use the gallery to explore how boards, panels, and sources work together to visualize data. You can even edit the gallery or clone boards to make your own boards.

Included Trends boards

Trends provides the following boards in the initial gallery:

Trends boards in the initial gallery

Board	Description
Connect	Daily data throughput and connection metrics
Containers	Container usage in the environment (requires Tanium™ Containers)

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Board	Description
Inventory	Hardware and software in the environment
IT Hygiene Assessment	Managed and unmanaged assets in the environment
IT Operations Metrics	Business metrics for IT operations
Operations Monitoring	Reboot status, browser versions, and product versions
Policy Monitoring	Endpoint policies for Windows firewall and USB write protection
Risk and Security Metrics	Business metrics for risk and security
Tanium Client Counts	Counts of Tanium-managed endpoints, derived from Client Status
Tanium™ Client Management	Tanium Client versions and deployment metrics
Tanium Health	Endpoint status and Tanium Client versions
Trends - Module Health	Source collections and Trends resource usage on the Tanium Module Server

Note: This list contains only boards from the Trends initial gallery, not boards that other Tanium solutions provide separately.

Before you begin

- If the Core Content pack, Default Content pack, or Tanium modules are not present when you import the gallery, the corresponding Trends boards, panels, and sources are not created. You can re-import the gallery at a later time after you import the content or solution to create these boards, panels, or sources.
- If you import Trends with the default settings, Trends automatically imports the initial gallery. This includes boards and sources provided by other Tanium solutions that are already imported and configured.
- If you import Trends with the default settings and later import another Tanium solution, Trends automatically imports the boards and sources for that solution after the service

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account is configured for the solution.

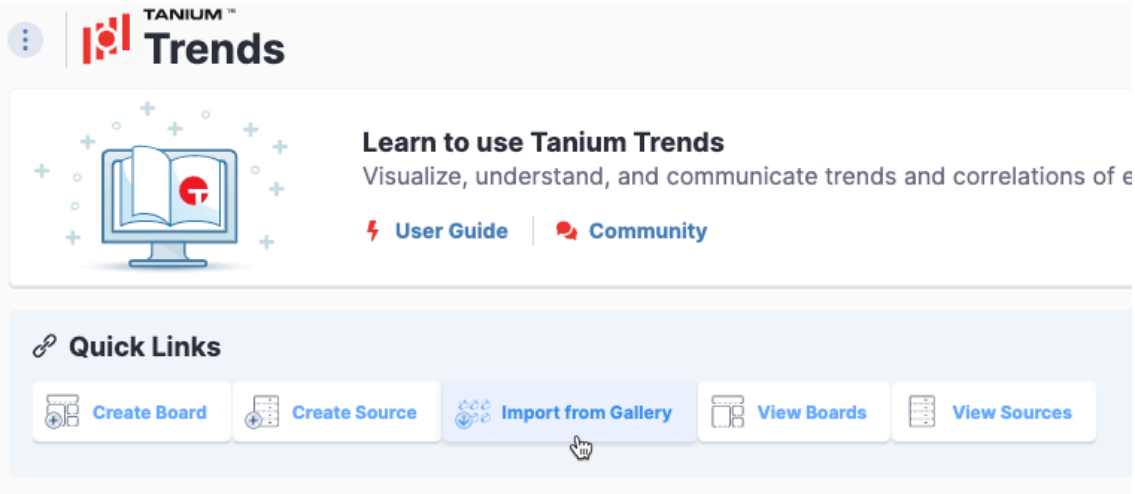
Import the gallery

About this task

When you import the gallery, you can select which boards and panels to import. Trends creates those boards along with any corresponding sources, panels, and sections. You can re-import the gallery at any time.

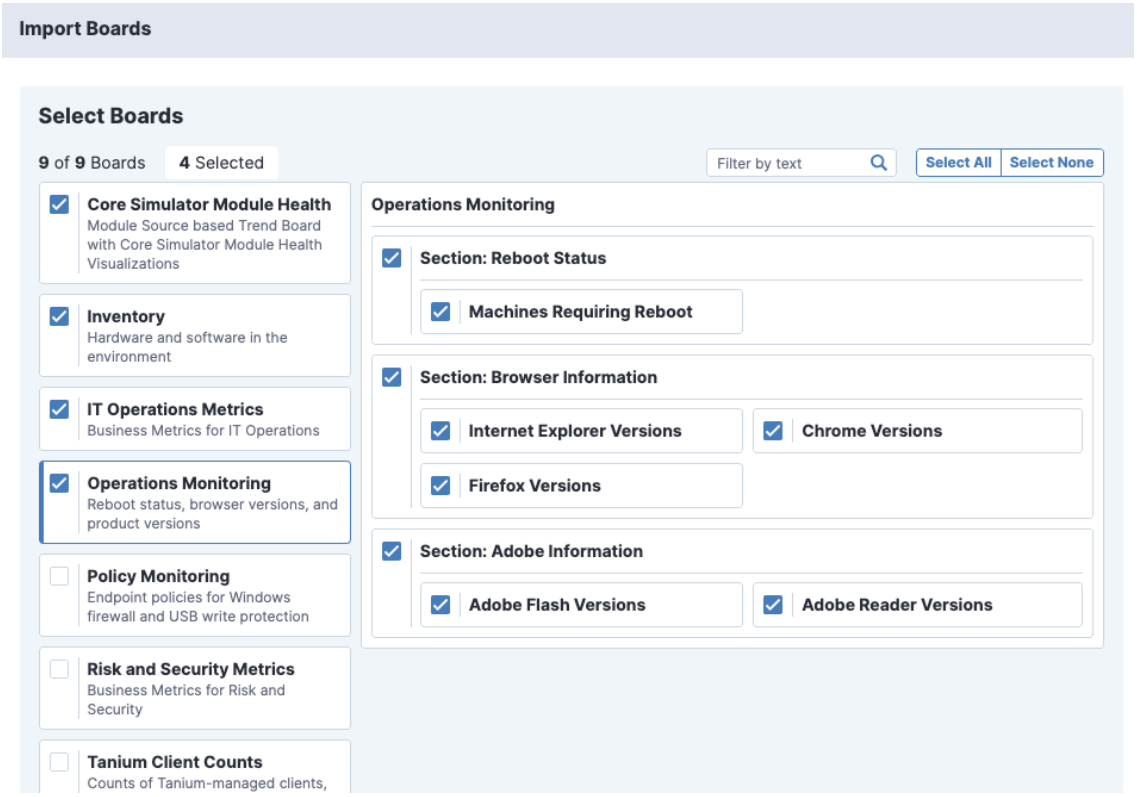
Important: Trends does not overwrite panels or sources that already exist in your Trends workbench. To reset any panels or sources in the galleries, delete the panels and sources that you want to reset, and then re-import the gallery. If you import a board that already exists in your Trends workbench, Trends merges any new panels into the existing board.

1. From the Main menu, go to **Modules** > **Trends** > **Boards** and select **> Import Gallery**.
   - If available, you can also import the gallery from the **Quick Links** on the Trends **Overview** page.



2. Select the boards, sections, and panels to import.
   - If you select a panel, the parent section and board are automatically selected.
   - If you select a section, the parent board and child panels are automatically selected.

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3. Click **Validate**, review the content to import, select resolutions for any conflicts, and click **Import**.

   Tip: To reselect which boards to import, click **Back**. To exit without importing, click **Cancel**.

Result

Trends immediately issues any saved questions that imported panels use. Within a few seconds, Trends starts collecting initial results and shows data in the boards and panels. After the initial data appears, explore the boards and panels to discover what you can do with Trends. You can edit board settings and clone a board if you want to create a similar board.

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Working with sources

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

A source is a configuration that defines where data originates. In Trends, sources provide data to build charts. For an overview of the source types, see Saved question sources on page 7 and Module sources on page 7.

View source details

1. From the Main menu, go to **Modules** > **Trends** > **Sources**.
2. Review the data collection **Metrics** that apply to all sources.
3. Select one of the following tabs to view sources:
   - **User Defined**: Sources that you create or import.
   - **Managed**: Sources that Tanium provides, including sources from other Tanium solutions. These sources are read-only, but you can disable them to stop data collection.

   An icon indicates the status of each source.

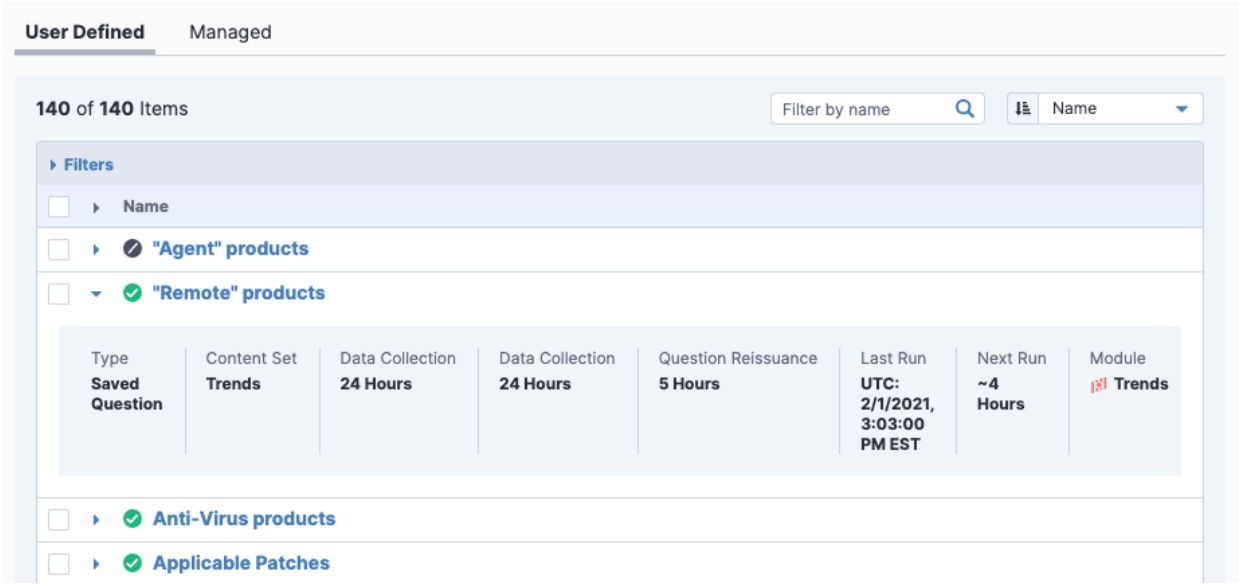
Source statuses

Status	Description
	The last source run completed successfully.
	The source is running.

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Status	Description
	The source run is initializing.
	The source is queued and waiting to run. This status appears when Trends is still collecting computer group membership, or when Trends reaches the limit on concurrent source runs.
	The source is disabled.
	The most recent source run failed to complete.

4. Expand a source to view its basic information.

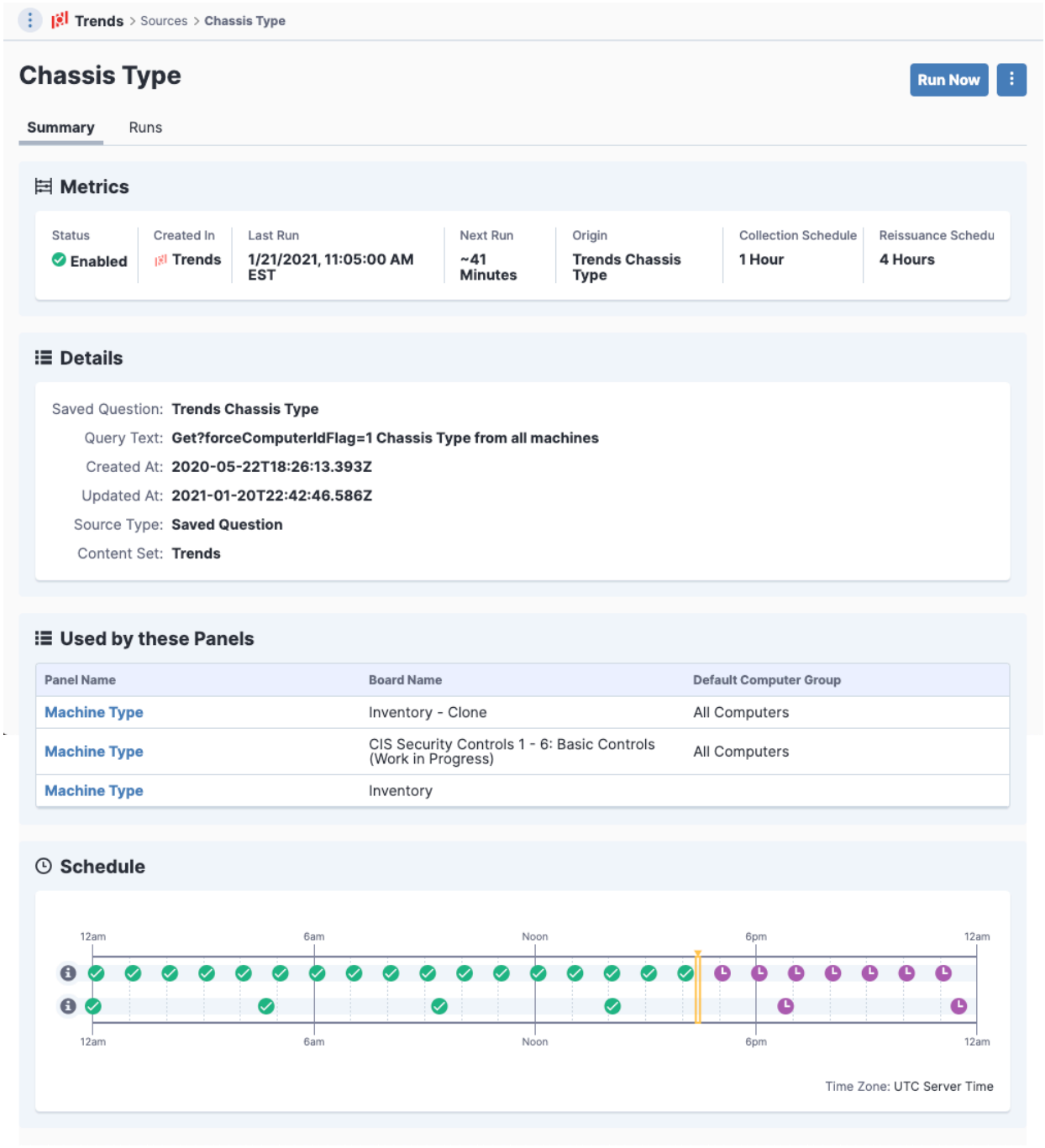


5. Click a source **Name** to view all its details in the **Summary** tab. The details for a module source or saved question source include any panels that use the source. Details for a saved question source also include metrics, the collection run schedule, run logs, and the associated Trends saved question. The run schedule contains a 24-hour view of all runs for the saved question source. In the **Schedule** chart, icons indicate the status of collection runs:
   Successful

   Pending (future)

   Failed

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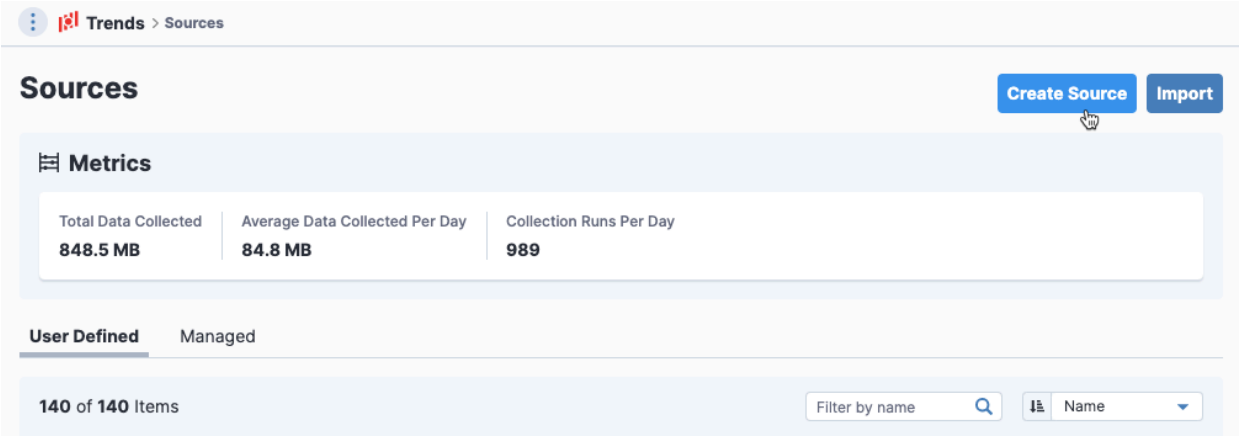


6. (Optional) Click the **Runs** tab to view the status and results of the collection runs for a source. Click the **Status** of a specific run to see its details.

Create a saved question source

1. From the Main menu, go to **Modules** > **Trends** > **Sources** and click **Create Source**.

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2. Enter a **Name** to identify the source.

   > **Note:** Source names must be unique. This includes sources that you might not have access to view. For more information, see Unable to view or select content on page 80.

3. (Optional) Enter a **Description** that can help other users understand the purpose of the source.

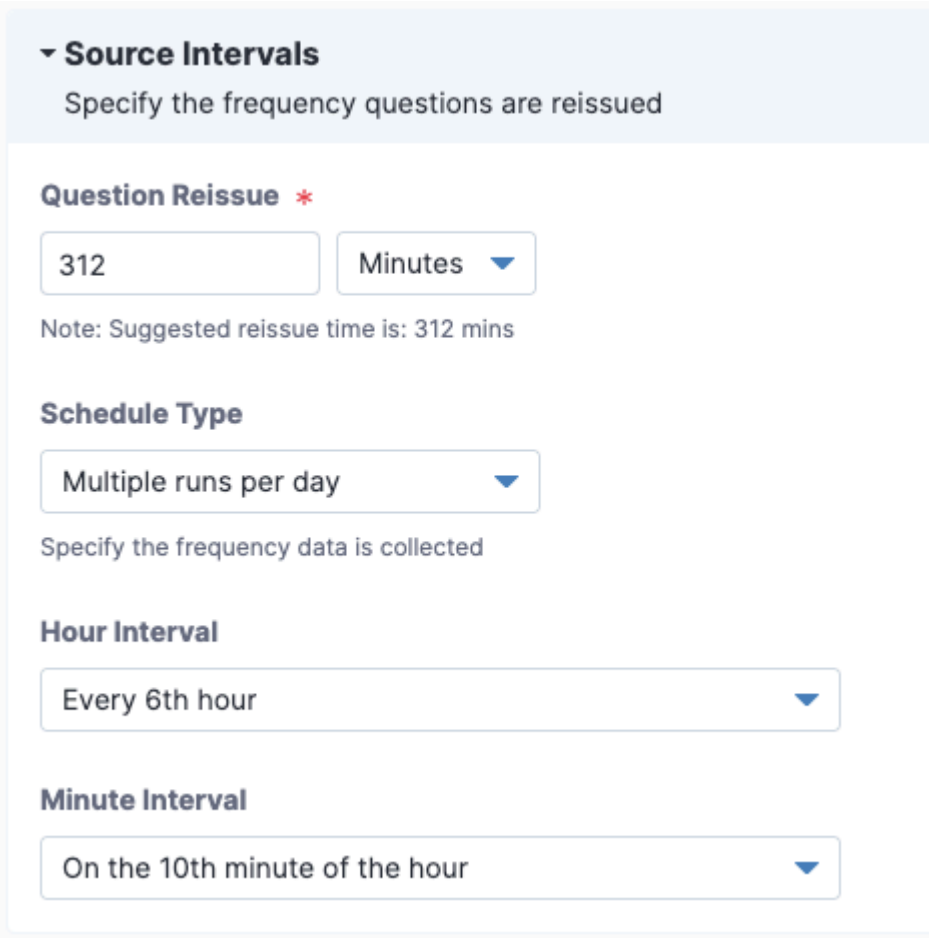
4. (Optional) Select a **Content Set** if you do not want to assign the source to the default **Trends** content set. The dropdown list shows only the content sets for which you have **Trends API Source write** permission. Users require **Trends API Source read** permission on the selected **Content Set** to access the source.

5. In the **Source Intervals** section, specify how often to reissue the question and how often to collect results.
   - When Trends issues the question, online endpoints return results and the Tanium Server stores the results. Specify a **Question Reissue** frequency that maximizes the number of endpoints from which to collect data.

     > **Note:** Trends provides a suggested reissue time around 300 minutes, or five hours. This frequency is designed to get responses from endpoints that might be offline sometimes during a one day period but are online at one of the times the saved question is issued. For more information, see Reference: Trends data collection for saved question sources on page 92.

   - For the **Schedule Type**, specify how often the source must run. A source run collects results from the Tanium Server. When Trends collects results, it issues the question one more time to get the latest results. After Trends collects the results, any panels that use the source update with the latest data.

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6. Use the **Select Data** widgets to configure the saved question settings. The widgets are similar to the Interact **Question Builder** widgets described in Tanium Console User Guide: Issue a question through the Question Builder. When you click **Apply**, Trends issues the question to the endpoints and shows a preview of the results.

   Tip: Trends stores results as counts of the answers that Tanium Clients return after running sensors on endpoints. Make sure the saved question uses a sensor that returns stackable counts. The question `Get Tanium Client IP Address from all machines` is an example that returns results that you cannot stack because IP addresses are unique for each endpoint. Charts do not show non-stackable results in a way that is easy for users to view.

7. Click **Create**. Trends creates the saved question source in addition to a saved question. Trends immediately issues the saved question to Tanium Clients. Within a few seconds, Trends starts collecting the initial results. Full results are available after ten minutes. Trends issues the saved question according to the frequency that you specified.

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Edit a saved question source

About this task

CAUTION: Use caution when you edit the syntax of the saved question in a source. If you edit the syntax but do not remove any columns, any cached endpoint data is lost and panels that use the source might require several runs to collect responses from all endpoints. If you remove columns when you edit the saved question, previously collected data might be unavailable.

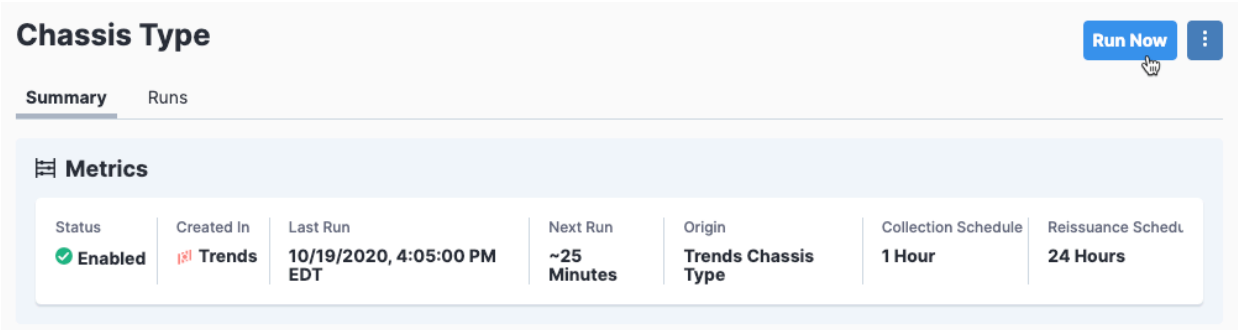
1. From the Main menu, go to **Modules** > **Trends** > **Sources** > **User Defined**.
2. Click the **Name** of the source and click **Edit**.
3. Edit the settings that you want to change and click **Save**. For descriptions of the settings, see Create a saved question source on page 40.

Collect results for a source

About this task

Trends automatically collects results for a saved question source according to the schedule that you set when you create the source. You can also manually collect results for saved question sources and some module sources.

1. From the Main menu, go to **Modules** > **Trends** > **Sources** and select **User Defined** or **Managed** sources.
2. Click the **Name** of a source to open it and then click **Run Now**.



If Trends is already collecting results for the source, **Run Now** is disabled. If the **Run Now** option does not display, the source does not support manual collection. For saved question sources, Trends issues the saved question and starts collecting the latest results within a few

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seconds. Full results are available after ten minutes, and any panels that use the source update with the latest data.

3. (Optional) Click the **Runs** tab to view the status and results for the run. Click the **Status** of a specific run to see its details.

Disable or enable a source

About this task

You can disable saved question sources and module sources. If you disable a saved question source, Trends continues to issue the associated saved question but does not collect results. You can select a disabled source when you create or edit a board panel, but Trends does not resume collecting data for the panel until you re-enable the source.

1. From the Main menu, go to **Modules** > **Trends** > **Sources** and select **User Defined** or **Managed** sources.
2. Perform one of the following steps:
    - Select sources to disable and click **Disable**.
    - Select sources to enable and click **Enable**.

Delete a source

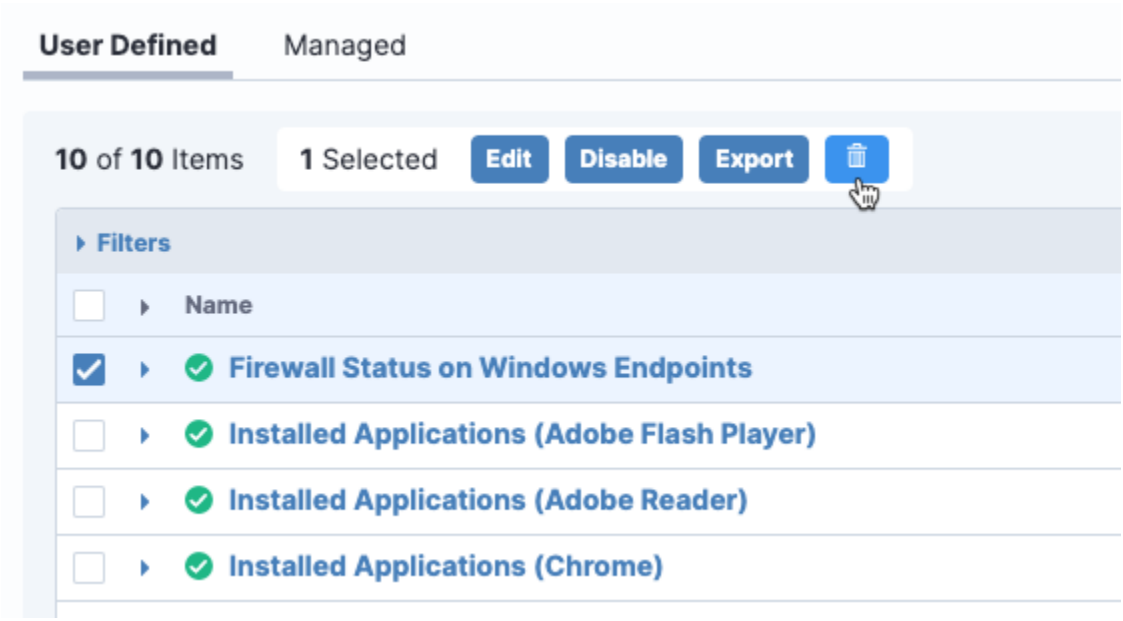
About this task

You can delete only user-defined sources, not Tanium-managed sources. If you delete a saved question source, the operation deletes any previously collected data and any panels that use the source.

1. From the Main menu, go to **Modules** > **Trends** > **Sources** > **User Defined**.
2. Select sources to delete and click Delete .

Result

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Building and publishing boards

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

Perform the following tasks to build and publish a board:

1. Create a board on page 47.
2. Edit a board on page 48.
3. Add sections to a board on page 49.
4. Add panels to a board on page 50.
5. Publish boards on page 54.

View boards

1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. (Optional) Filter the list of boards by:
   - **Name or description**: In the **Filter items** field, enter all or part of a board name or description.
   - **Favorites**: Click a **Show** toggle button to list **All** boards or only the Favorites.

     Tip: Click Favorite next to any board to add it to your favorites list. You can quickly access all your favorite boards and panels on the Trends **Overview** page.

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3. Expand ▸ a board to see the following details about it:
    - **Panels** that the board contains. You can click a panel name to open the associated source.
    - **Content Set** assignment.
    - Number of **Sections** and **Panels** in the board.
4. Click the **Name** of a board to see all its settings and contents. For more information about viewing board contents, see Viewing chart results on page 58.

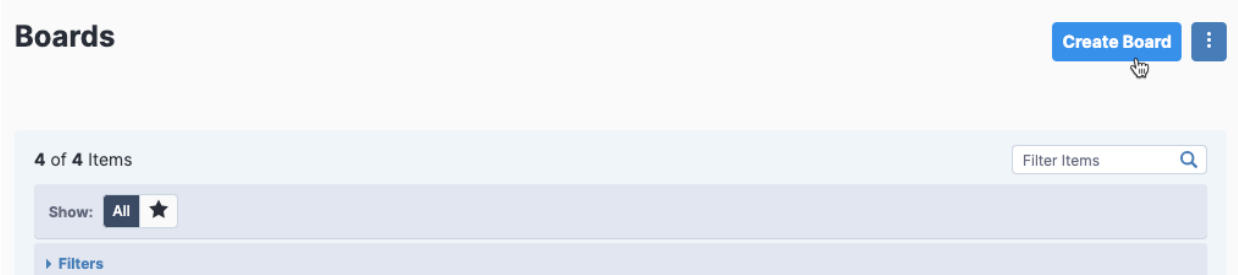
Create a board

About this task

Perform the following steps to create a new board from scratch.

Tip: To create a board that differs only slightly from an existing board, cloning the existing board and editing its settings is easier than creating a board from scratch. For more information, see Clone a board on page 48.

1. From the Main menu, go to **Modules** > **Trends** > **Boards** and click **Create Board**.



2. Enter a **Name** to identify the board.
3. (Optional) Enter a **Description** that can help other users understand the purpose of the board.
4. (Optional) Select a **Content Set** if you do not want to assign the board to the default **Trends** content set. The dropdown list shows only the content sets for which you have **Trends API Board write** permission. Users require **Trends API Board read** permission on the selected **Content Set** to access the board.
5. Click **Create**. Trends opens the **Boards** page, from where you can open the new board for

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editing.

6. Add sections and panels to the board as necessary:
    - Add sections to a board on page 49.
    - Add panels to a board on page 50.

Clone a board

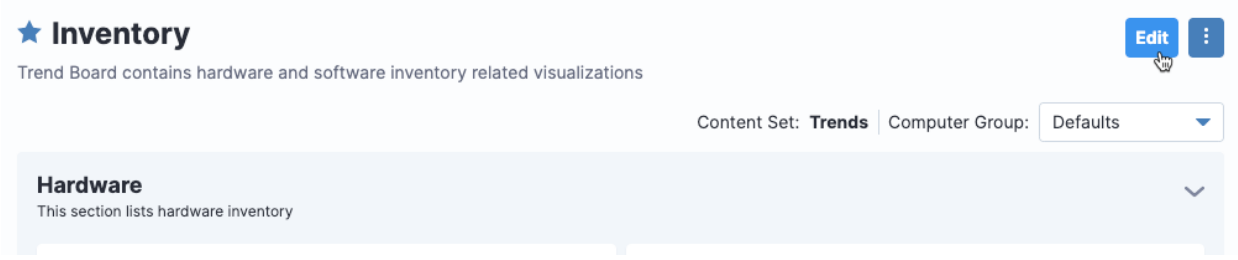
1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Click the **Name** of the board that you want to clone.
3. Select ⋮ **> Clone**. The cloned board appears with the same name as the original board with – `Clone` appended to the name. If you clone a board and an existing cloned board has the same name, Trends appends a timestamp to the new board name.
4. Click **Edit**, update settings as necessary (see Edit a board on page 48), and click **Save**.

Edit a board

About this task

After you create a board, you can edit the board to add, remove, and reorder sections and panels. You can edit a board at any time, including boards in the initial gallery.

1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Click the **Name** of the board to open it and click **Edit**.



3. Perform any of the following edits and click **Save** when you finish.
    - Change the **Name** or **Description**: Click Edit beside the board name, enter new values, and click **Continue**.
    - Select a different **Content Set**.

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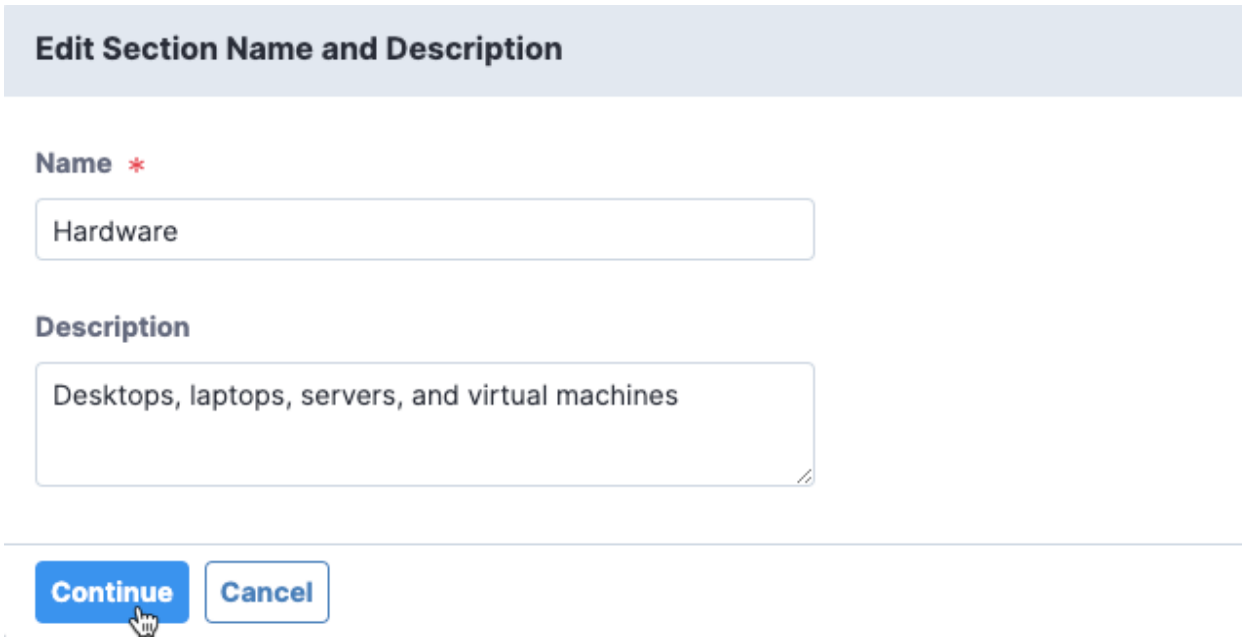
- Reorder sections: Click **Reorder**, drag the section blocks to the new order, and click **Continue**. The **Reorder** button appears only if the board has two or more sections.
- Move a panel within a section: Click Move Left or Move Right until the panel is at the desired location.
- Change the width of a panel: Click Full Width or Half Width.
- Edit text that appears on the board: Click Edit beside the text.
- Add sections to a board on page 49.
- Add panels to a board on page 50.
- Delete a section: Click Delete in the section header to delete the section and all its panels.
- Delete a panel: Click Delete in the panel header.

Add sections to a board

About this task

A section is a collapsible division on a board that you can use to group panels. A board can have multiple sections, and each section can contain multiple panels. A board always has one predefined section, and additional sections are optional.

1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Click the **Name** of the board to open it, click **Edit**, and click **Add Section**.
3. Enter a **Name** and (optional) **Description** for the section, and then click **Continue**.



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The section appears at the bottom of the board.

Tip: To move sections, click **Reorder**, drag the section blocks to the new order, and click **Continue**. The **Reorder** button appears only if the board has two or more sections.

4. Add one or more panels to the section. For more information, see Add panels to a board on page 50.

Add panels to a board

About this task

The source that you want to use for the panel must exist before you create the panel. For more information, see Working with sources on page 38.

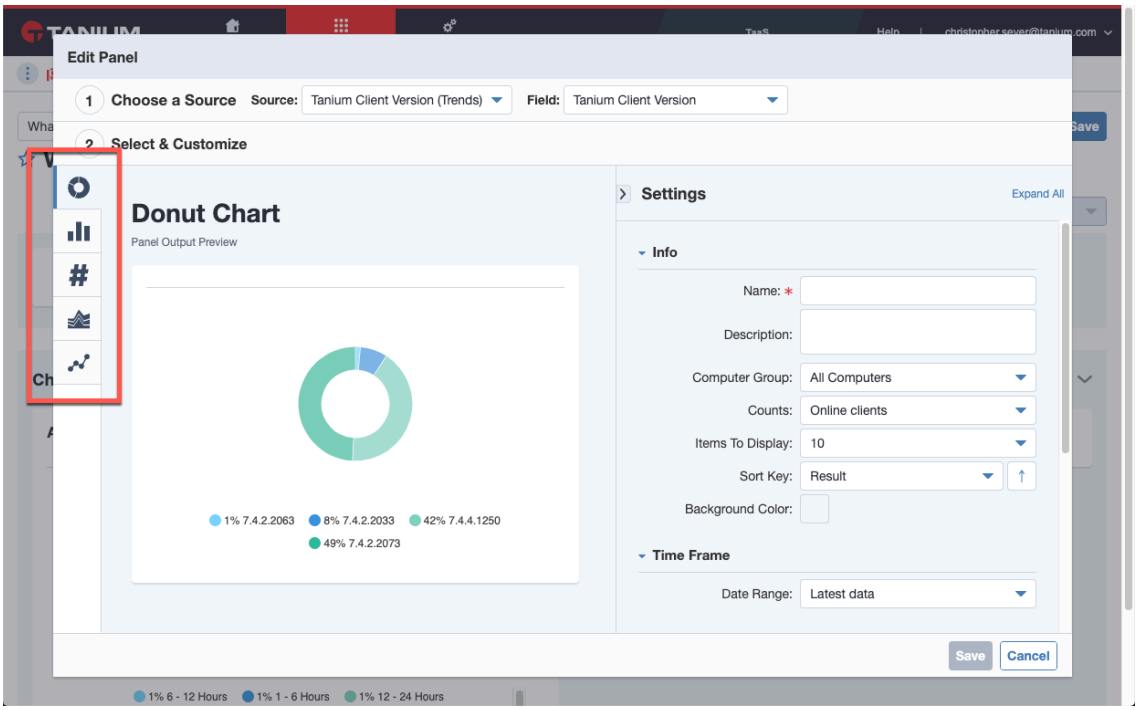
1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Click the **Name** of the board to open it and click **Edit**.
3. Click **Add Panel** in the section where you want the panel.
4. Configure the following settings:
   a. Configure the source settings:

      #### Source settings

Setting	Description
Source	Select the saved question source or module source.
Field	(Saved question sources only) For saved question sources that return multiple fields, select the field to use for the panel. If the source contains one field, such as a saved question source that uses a single column sensor, only one option is available.
Value	(Module sources only) For module sources that contain multiple calculated values, select the value to display in the panel.
Group By	(Module sources only) Select how to group data on the panel. This setting is only available for module sources that contain fields by which to group data.

   b. Select a chart type. For more information, see Reference: Chart options in Trends on page 84.

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c. Customize the following chart settings. The available settings depend on the source type and the chart type.

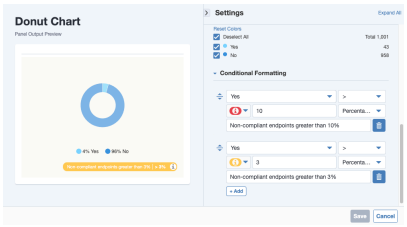
Chart settings

Setting	Description
Name	Specify a name to display at the top of the panel.
Description	Type a description to inform other users about the purpose of the configuration. The description appears on the board and panel pages.
X Axis Label	Enter a label to display horizontally under the chart. This option only displays for chart types that use axis labels.
Y Axis Label	Enter a label to display vertically to the left of the chart. This option only displays for chart types that use axis labels.
Computer Group	(Saved question sources only) Select the default computer group for which to display data in the panel. The computer groups include computer groups that are available to Trends and that you have access to. To edit which computer groups are available to Trends, see Configure visibility groups on page 29 .
Aggregate	(Number charts only) Select the value from which to aggregate the data for the chart. For example, the values for the **Reboot Required** source are **Yes** or **No** ; select **Yes** to display the number of **Yes** responses.

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Setting	Description
Subtitle	(Number charts only) Text to display under the value in the number chart.
Scale	Select how to scale values on the y-axis. Options include: • **Linear** - Use consistent values on the y-axis. For example, if the minimum data point on a chart is 1, and the maximum data point is 100, the y-axis values would be 0, 20, 40, 60, 80, and 100. • **Logarithmic** - Scale the y-axis on an exponential basis. Use this option for charts that contain a large range of data points.
Display Options	(Number charts only) Select how to display the value in a number chart. • **Count** - Display the data in a number chart as a number. • **Percentage** - Display the data as a percentage of the total results.
Trend Indicator	(Number charts with saved question sources only) Select to hide or show a trend indicator on the chart. When you select **Show**, select the direction of the indicator, and the value to compare with the current value. If the value that you want to compare against does not exist, the trend indicator does not display.
Source Value Format	(Module sources only) Select how to display values in the chart for items and axis scales. Options include: • **Default** - Display large values (>= 1000) on the y-axis with International System of Units (SI) prefixes, and full numbers for hover and chart labels. For example, the y-axis might display 1.23M for an item and hovering the cursor over the item displays 1,230,000. • **Percentage** - Display values as percentages. This option only changes the format of the values to display; values are not recalculated. Use this option when values are between 0 and 1. For example, 0.4 displays as 40%. • **SI Prefix** - Display all large values using SI prefixes. For example, 1,230,000 displays as 1.23M.
Counts	(Saved question sources only) Select to include data from **Online clients**, or data from **Online and most recent offline clients**. The online and offline statuses relate to the time when Trends collected results, not the present time. **Online clients** are endpoints that responded to the question within the last 24 hours. **Online and most recent offline clients** are endpoints that responded within the last week.
Items To Display	The maximum number of items to display in the chart.

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Setting	Description
Sort Key	Select how to order the items in the chart. • You can order items in the chart by the name of the item, or by result (value of the item). • You can also toggle the sort order. Set to to sort the items in the chart in ascending order (low to high), or set to to sort the items in the chart in descending order (high to low).
Background Color	Select the default background color of the chart.
Date Range	Select a date for one day charts or a date range for historical charts. For more information, see Reference: Chart options in Trends on page 84 .
Legend	Use this section to customize the items that appear in the chart. • To exclude an item from the chart, deselect the checkbox next to the item. • Click the color next to any item to change the color that displays for that item. Colors can be reused by multiple items.
Conditional Formatting	Expand **Conditional Formatting** and click **Add** to add a label to the chart when a threshold condition is met. In addition, you can apply the conditional color to the background of the chart; this overwrites the default background color. When you add conditional formatting, viewers can easily identify panels that need attention. You can add multiple conditions to a chart. Conditions are evaluated in descending order; the first condition that triggers a match is applied to the chart. 

5. Click **Save**. The panel appears on the board and shows any data that the source collected.

Result

Tip: Click Favorite beside any board or panel name to add it to your favorites list. You can quickly access all your favorite boards and panels on the Trends **Overview** page.

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Publish boards

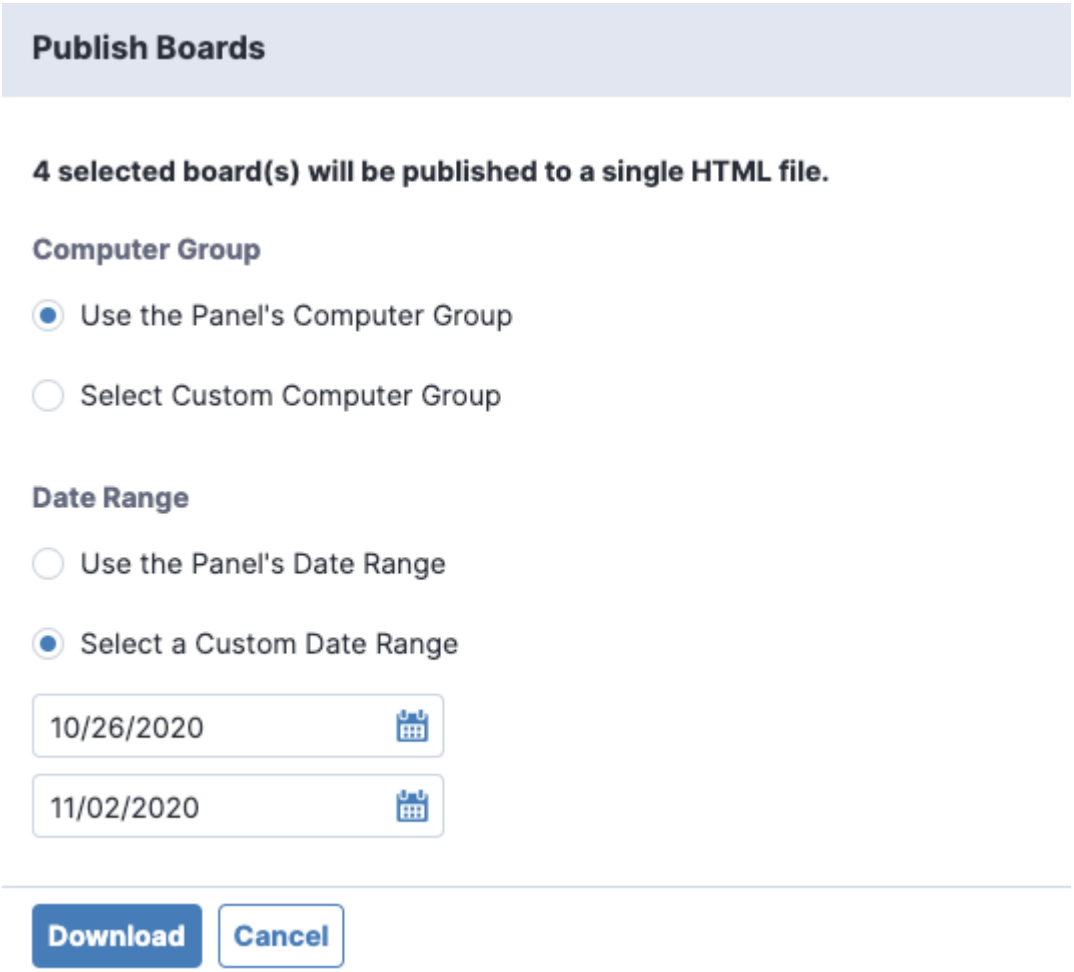
About this task

You can publish one or more boards to a standalone HTML file that you can distribute to stakeholders or post to an internal web server. Published files download to your local file system through the browser.

1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Perform one of the following steps based on whether you want to review a board before publishing it:
   - Review: Click the **Name** of the board to open it, review its contents, and select **> Publish**.
   - No review: Select the boards to publish and click **Publish**.

   If you select multiple boards, Trends publishes the boards to a single HTML file.
3. Select the **Computer Group** for which to display data in each panel. You can choose to use the computer groups that are currently displayed in each panel, or select a computer group for all panels.
4. Select the **Date Range** for which to display data in each panel.
   You can choose to use the date ranges that are currently displayed in each panel, or select a custom date range for all panels. If you select a custom date range, single-day charts use the **To** date.

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5. Click **Download**.

Result

Trends renders the selected boards into an HTML file that downloads to the local file system.

Delete a board

About this task

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

1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Perform one of the following steps based on whether you want to review a board before deleting it:
   - **Review**: Click the **Name** of the board to open it, review its contents, and select **> Delete**.

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- No review: Select the boards to delete and click **Delete**.

Export boards through Tanium Connect

About this task

Use Connect to deliver published boards in an HTML format to Email, File, and AWS S3 destinations.

Before you begin

- You must have access to Connect with the Connect Operator or Connect Administrator role.
- You must have a role with permission to publish boards. Permissions that provide access to publish boards include Trends Publish, Trends API Board Read, and Trends Data Read. Predefined roles with required permission include Trends Administrator, Trends Author, Trends Board Author, and Trends Operator.
- You must have Connect 4.11.2 or later and Trends 2.4.0 or later.
- You must first create or import a board in Trends.

Create a connection

1. From the Main menu, go to **Modules** > **Connect** > **Overview**.
2. Go to the **Connections** section and click **Create Connection**.
3. In the **General Information** section, provide a name and description for the connection.
4. In the **Configuration** section, select **Tanium Trends** for the source.
5. Select the board to publish.
6. (Optional) To override the default computer group for each panel, select a specific **Group Name**.
    - If you select a **Group Name**, this setting overrides any default computer group for each panel.
    - If you do not select a **Group Name,** the board uses the computer groups that are currently set in each panel.
7. For the destination, select where you want Connect to send the board. Provide any

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additional configuration for the type of destination you select.

- For the best results when sending boards to **Email** or **File**, select a compression method in the **Advanced** settings. If you do not select a compression method, Connect sends the file as HTML.
- If you select **File** and choose a compression method, make sure the file extension in **File Name** is the same as the compression method.
- If you select **Email**, make sure to select **Attachment** in the **Advanced** settings.

8. (Optional) In the **Schedule** section, set up a schedule to publish the board.
9. Click **Save**.

Result

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

For more information about connections, see Tanium Connect User Guide: Managing connections.

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Viewing chart results

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

After you create a board and add panels, the charts on the board start showing data based on the collection schedule of the underlying sources.

Open links from charts

About this task

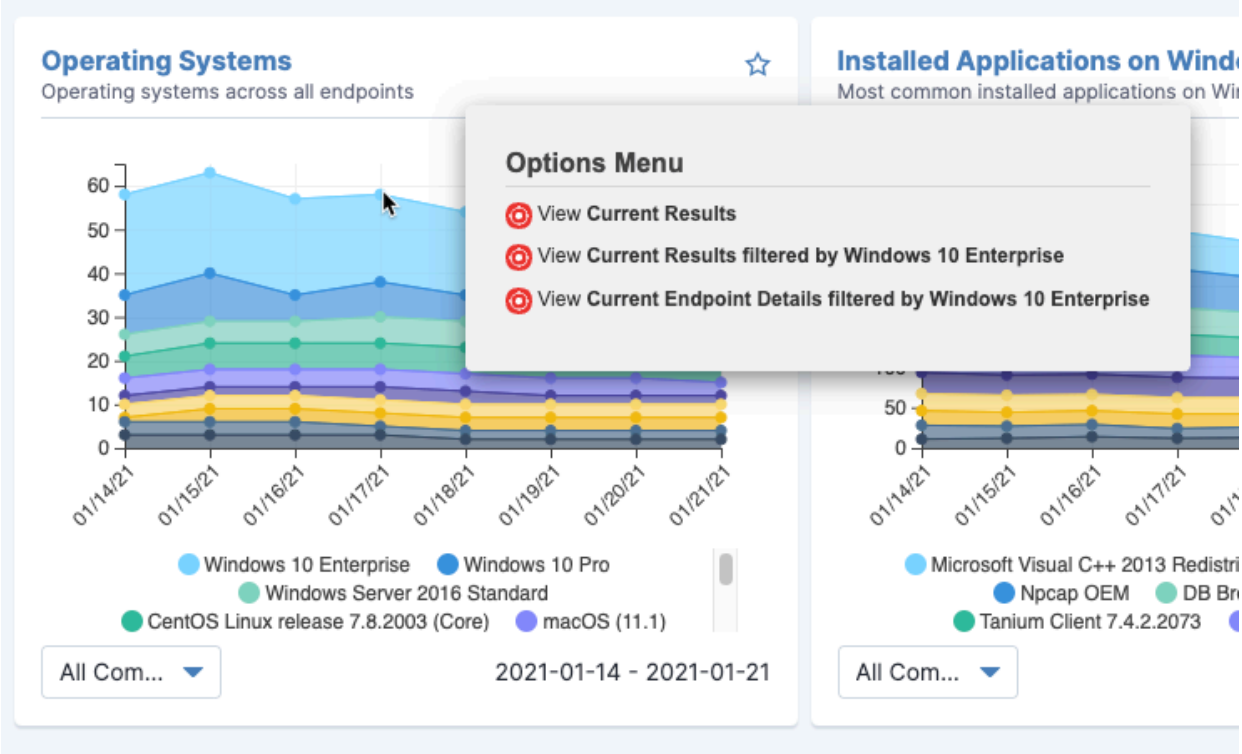
When you view a board, you can click data points on charts to view the data in more detail.

Note: You require the **Ask Dynamic Questions** permission to access links on charts that are based on saved question sources.

1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Click the **Name** of a board to open it.
3. Click a data point on the chart to open a menu. The available menu options depend on the source of the chart data:
   - Saved question sources: The menu contains options to show data in Tanium Interact. This includes options to view live results for all data points, or to view results filtered by the specified condition, with or without additional endpoint details.
   - Module sources: The menu contains options to show the data in the Tanium solution

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that provides the data.



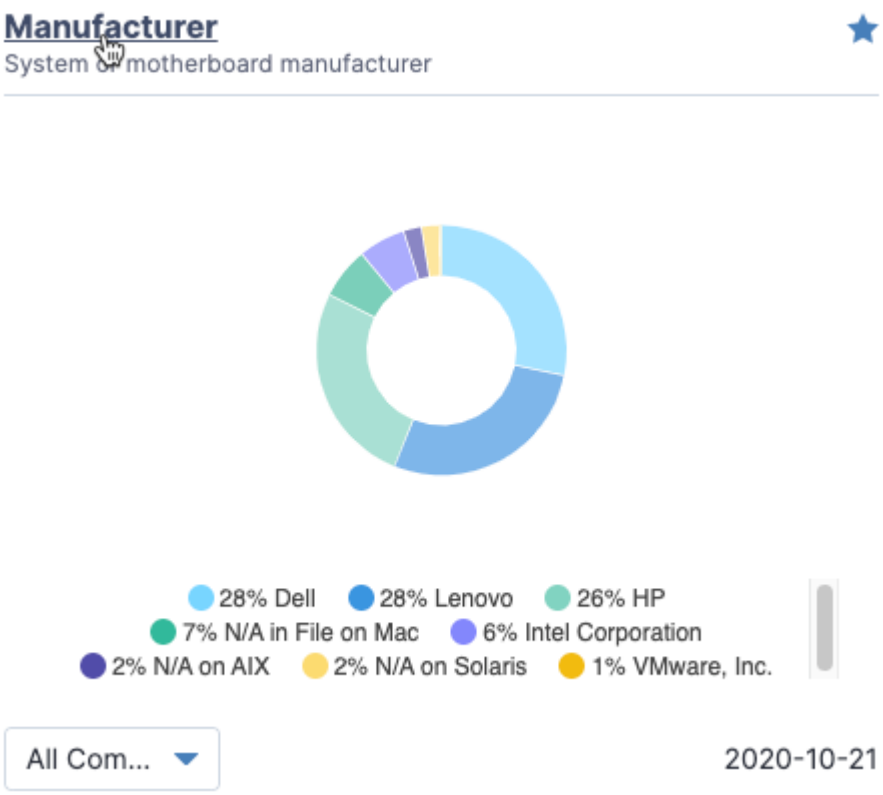
View results in panels

About this task

When you view a board, you can click a panel to view the data in more detail.

1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Click the **Name** of a board to open it.
3. Click the name of the panel that you want to view.

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4. (Optional) Click a data point on the chart to view the data in more detail.
5. (Optional) You can temporarily modify the following settings in the **Trends View** tab. Trends does not save your changes when you leave the page.

> **Tip:** To permanently modify panel settings, click **Edit**, update the panel settings described in Add panels to a board on page 50, and click **Save**.

Trends View settings

Setting	Description
Chart Type	Select the type of data visualization to use in the panel. For more information, see Reference: Chart options in Trends on page 84 .
Computer Group	(Saved question sources only) Select the computer group for which to display data in the panel. The computer groups include computer groups that are available to Trends and that you have access to. To edit which computer groups are available to Trends, see Configure visibility groups on page 29 .
Scale	For vertical bar charts, area charts, and line charts, select how to scale values on the y-axis. Options include:

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Setting	Description
	• **Linear** - Use consistent values on the y-axis. For example, if the minimum data point on a chart is 1, and the maximum data point is 100, the y-axis values would be 0, 20, 40, 60, 80, and 100. • **Logarithmic** - Scale the y-axis on an exponential basis. Use this option for charts that contain a large range of data points.
Date Range	Select a date or date range to display in the chart. For available options by chart type, see Reference: Chart options in Trends on page 84 .
Items	Select specific items to include or exclude in the chart. The available items depend on the results that the source collects.

View live results

About this task

You can view the most recent data collected for panels that use saved question sources.

Note: To view live results for a saved question source, you must have **Sensor read** permission on the content set that contains the sensor that the saved question source uses. For more information, see the Trends requirements on page 16.

1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Click the **Name** of a board to open it.
3. Click the name of the panel that you want to view.
4. Select the **Results** tab.

Result

The Trends saved question appears along with the most recent results. You can drill down into results, copy or export the results, deploy actions, and open the saved question in Interact. For more information, see Tanium Interact User Guide: Managing question results.

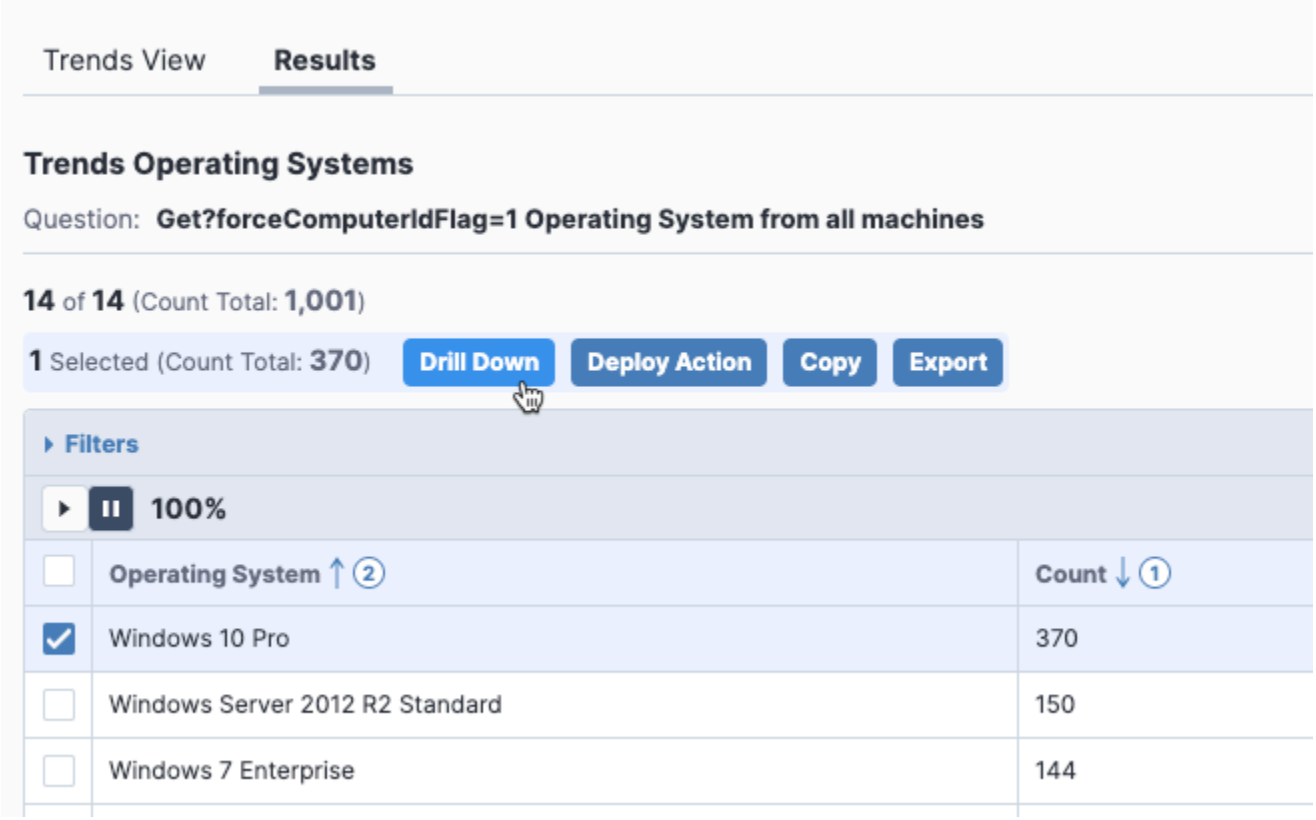
Drill down on the results

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About this task

Trends stores aggregate results of questions for computer groups visible to Trends. Trends does not store the full question results over the course of collection. You cannot drill down to past point-in-time data on specific endpoints, although it is possible to drill down on the current data set. For example, you cannot use Trends to see what OS patch a specific computer was running on a specific date in the past. Instead, you can use Trends to view the most recent results about OS patches, and from recent results, you can drill down to results for specific computers.

Select one or more rows and click **Drill Down** to obtain more details about the matching results.

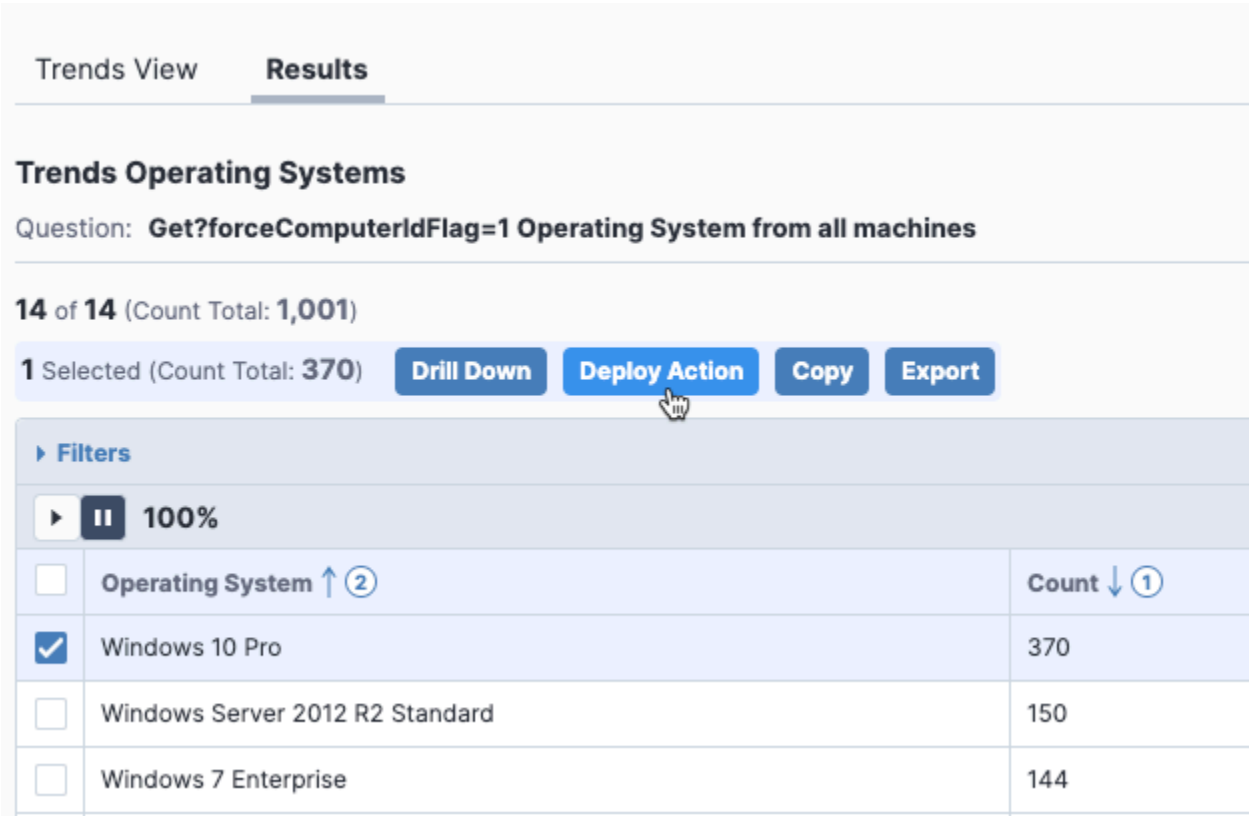


Deploy an action to one or more endpoints

About this task

Select one or more rows and click **Deploy Action** to deploy appropriate actions to the selected endpoints.

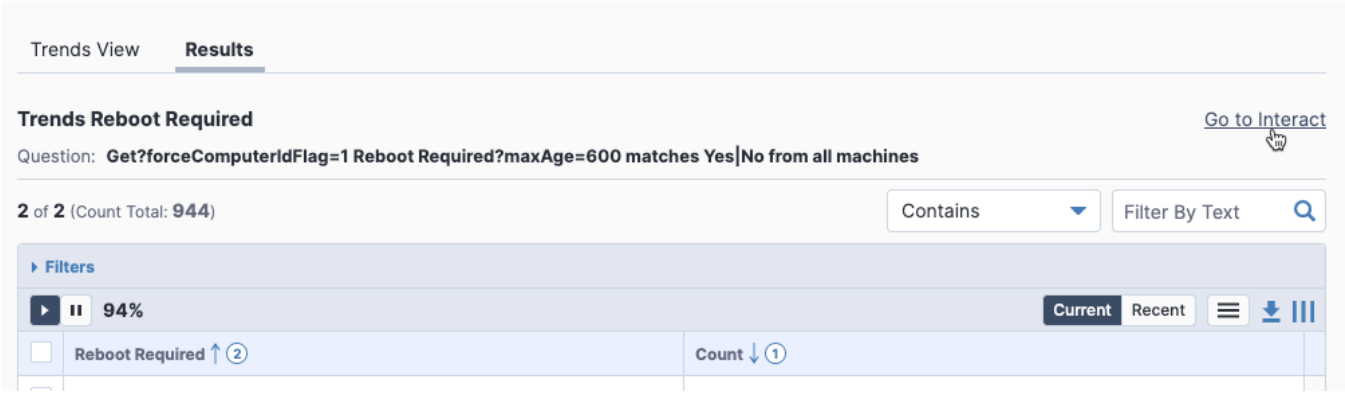
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Open the question in Tanium Interact

About this task

Click **Go to Interact** to open the saved question in Interact where you can view additional question details, ask additional questions, and deploy corrective action to endpoints.



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Importing and exporting configurations

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

You can export board, panel, section, and saved question source configurations to a JSON file for importing into another Tanium environment. A board configuration includes any saved question sources, panels, and sections that the board contains. You can edit the JSON file offline and then import the file back into Trends.

Export and import limitations

About this task

Exports and imports have the following limitations:

- **Sources**: Exported configurations do not include sensors, such as those in saved question sources, and do not include module sources.
- **Content sets**: Exported configurations retain content sets for boards and saved question sources. All boards and sources must be assigned a content set. When you import, Trends detects if all boards and sources are assigned to content sets, if all content sets exist, and if you have permission to write to the content sets. If any content sets are missing or you do not have permission to any specified content sets, Trends prompts you to select a content set to assign to the orphan content.

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- **Permissions**: When you export all boards, the export includes only the boards and sources for which you have permission.
- **Names**: Board and source names must be unique. A duplicate board or source name cannot exist in the same environment, even if you cannot see the duplicate object due to insufficient permission. For more information, see Unable to view or select content on page 80.

Export all boards

About this task

To export all board configurations in Trends:

1. From the Main menu, go to **Modules** > **Trends** > **Overview**.
2. Click Settings **> Export Boards and Panels** and click **Export All**.

Result

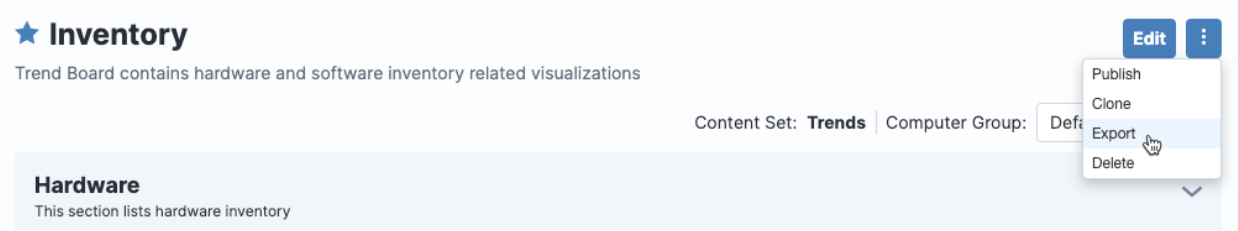
The exported file downloads to the download folder of your browser. The file contains all board configurations, including any sections, panels, and saved question sources that the boards use.

Export a single board

About this task

When you export a single board, you can select the sections and panels to include in the export file.

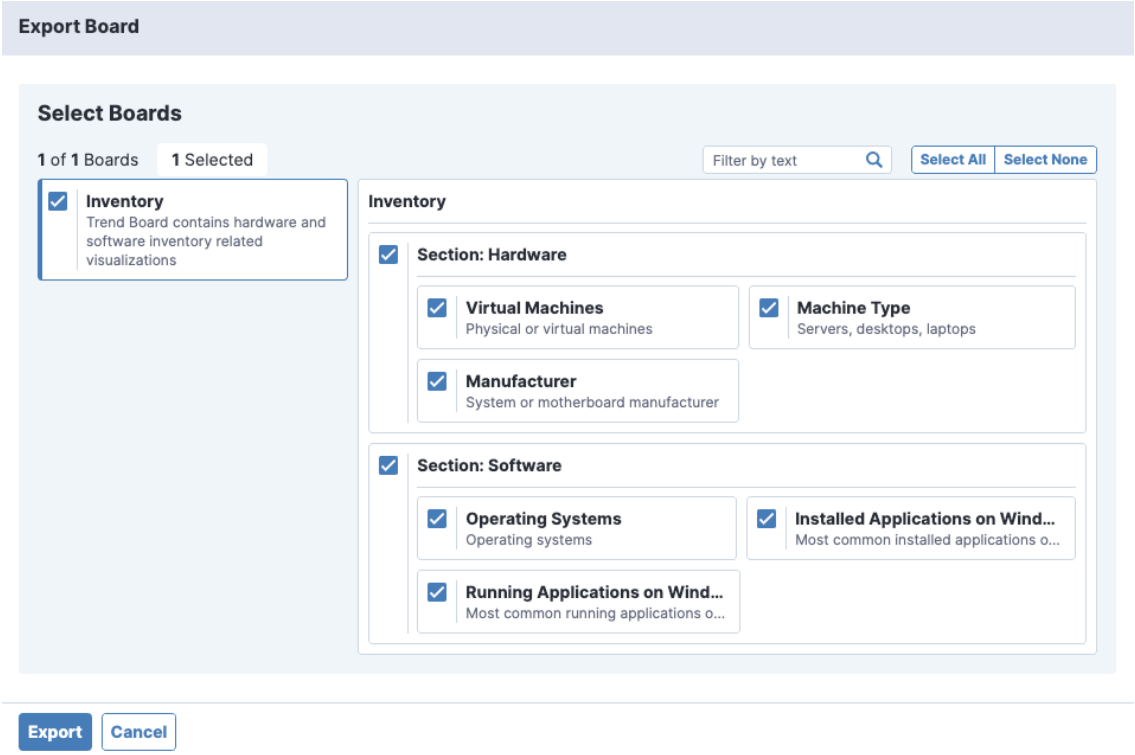
1. From the Main menu, go to **Modules** > **Trends** > **Boards**.
2. Click the board **Name** to open it and click **> Export**.



3. Select the sections and panels to include with the board in the export file, and then click **Export**. Note the following behavior when selecting items:

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- If you select a panel, the parent section and board are automatically selected. Any panel that you select also includes the corresponding source in the export.
- If you select nothing, only the board configuration is included in the export file.



Result

The JSON file downloads to the download folder of your browser.

Export saved question sources

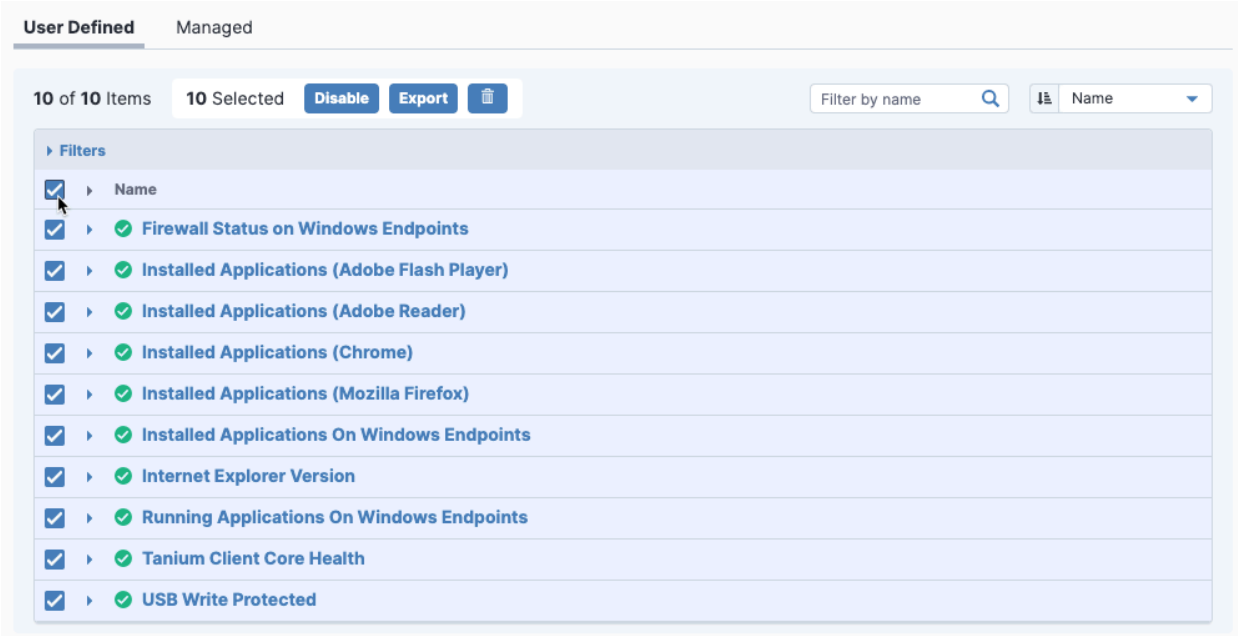
About this task

You can export saved question sources to a JSON file that you can edit and import back into Trends. The saved question sources do not need to be used by a panel.

Note: Exported configurations do not include sensors.

1. From the Main menu, go to **Modules** > **Trends** > **Sources** > **User Defined**.
2. Select the sources that you want to export.
   To export all saved question sources, click the checkbox beside the **Name** column header.

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3. Click **Export**. The export file downloads to the download folder of your browser.

Import boards, sections, and panels

About this task

You can import boards into Trends from a JSON file. If you import a board into an environment with an existing board of the same name, Trends merges any new panels from the imported board into the existing board, and Trends imports any new sources. An import cannot delete existing boards or modify existing panels and sources. To overwrite an existing board, rename or delete the board before you import the JSON file.

Note: You can import boards from a Trends 1.x export file into Trends 2.x and later. Note that Trends 2.x and later does not support bucketing or number extraction; any panels that use bucketing or number extraction will import without the data.

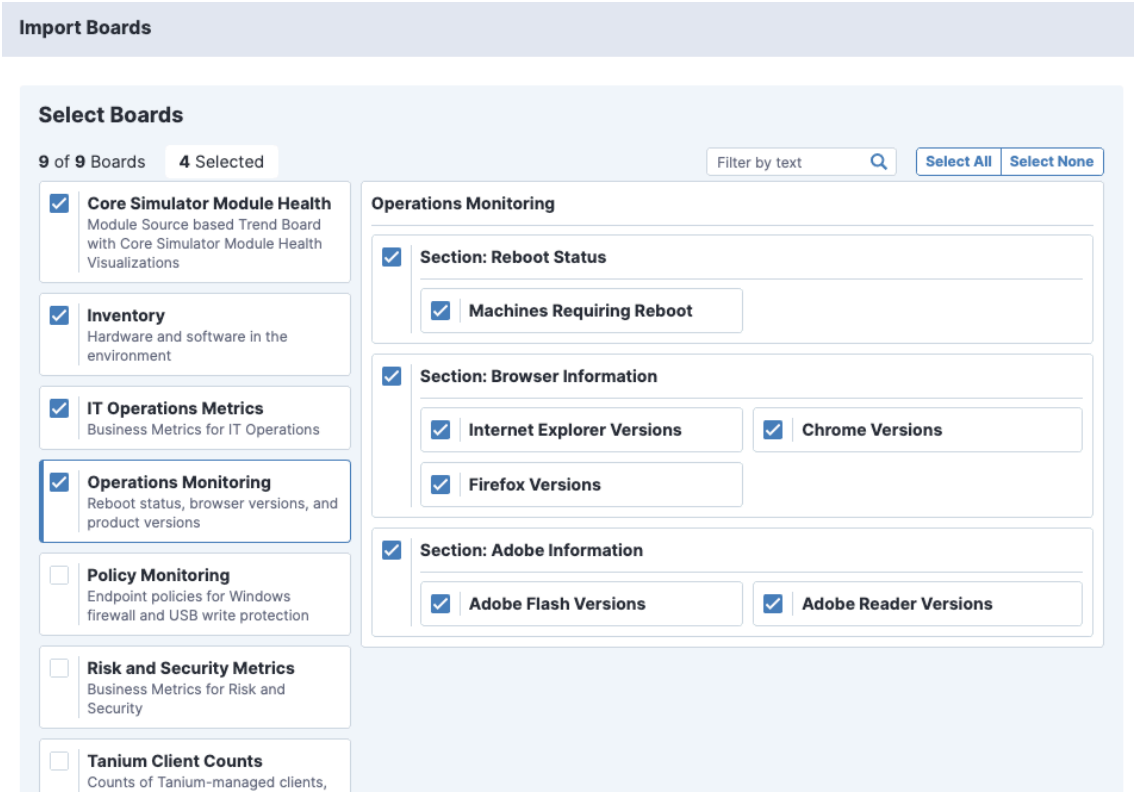
1. From the Main menu, go to **Modules** > **Trends** > **Boards** and select ⋮ **> Import File**.

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2. Drag the JSON file into the drop area, or click **Browse for File** to select the JSON file that you want to import.

3. Select the boards, sections, and panels to import. Note the following behavior when you select items:
    - If you select a panel, the parent section and board are automatically selected.
    - If the saved question source for a panel does not already exist in Trends, the import file must contain the source configuration. If a panel uses a module source, the Tanium solution must be installed before you can import the panel.
    - If you select a section, the parent board and child panels are automatically selected.



4. Click **Validate** and verify that the boards, sections, and panels are correct. If any boards or sources in the JSON file do not specify a content set, Trends prompts you to select a content set for those boards and sources.

5. Click **Import**. Trends immediately issues saved questions for any imported saved question

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sources. Within a few seconds, Trends starts collecting initial results and shows the data in the boards and panels.

Import saved question sources

About this task

You can import saved question source configurations from a JSON file. The sources do not need to be linked to panels. An import cannot delete or modify existing sources. To completely overwrite an existing source, rename or delete the source before you import the JSON file.

1. From the Main menu, go to **Modules** > **Trends** > **Sources** and click **Import**.
2. Drag the JSON file into the drop area, or click **Browse for File** to select the JSON file that you want to import.
3. Select the sources to import and click **Validate**.
4. Verify that the sources are correct. If any sources in the JSON file do not specify a content set, Trends prompts you to select a content set for those sources.
5. Click **Import**. Trends imports the sources and immediately issues the saved questions. Trends starts collecting initial results within a few seconds.

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Migrating Trends boards to Reporting

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

If you want to continue using any Trends boards, migrate them to the Tanium Reporting module. The migration converts the boards into Reporting dashboards and processes the migrated board panels based on their type of source:

- Saved question sources on page 8: Each source for a Trends board panel becomes a new report in Reporting. The report provides data for the corresponding dashboard panel. For dashboards panels that use historical data (such as panels with area charts), Reporting starts collecting data only when the dashboard is created and does not migrate historical data from the original Trends boards. Reporting collects data every 24 hours for dashboard charts that use reports, as described in Tanium Reporting User Guide: Manage historical data for report-based charts.

- Module sources on page 8: The Tanium solution that provides the source for a Trends board panel sends source data to Reporting for the corresponding dashboard panel after migration. The intervals at which Tanium solutions push updated module source data to Reporting varies by solution. The migration excludes deprecated module sources even if they still exist in your Tanium environment.

After the migration, replace any Tanium™ Connect connections that export Trends boards or sources with connections that export Reporting dashboards and reports, as described in Replace Connect exports on page 77.

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Note: You require the **Trends export** role permission to migrate boards and sources to Reporting. To check which Tanium-managed roles provide that permission, see User role requirements on page 19.

Before you begin

Complete the following steps to prepare for migration and to remove unnecessary content that does not require migration.

1. Delete boards that users do not need. For more information, see Delete a board on page 55.

2. Delete user-defined sources that do not provide data for the boards that you plan to migrate. Deleting unused sources conserves resources because Trends periodically issues questions and collects results for sources. If you delete a saved question source, the operation deletes previously collected data for that source and deletes board panels that use the source. For more information, see Delete a source on page 44.

3. Compare the computer groups that are selected for data collection in Trends and Reporting to determine if you must change the selections for Reporting and if you can delete unnecessary groups in Trends.

   In Trends, the selected groups are called visibility groups. The migration process does not migrate visibility groups to Reporting. In Reporting dashboards, you can refine the targeting for endpoints that provide chart data by assigning filter groups to the charts. Filter group assignments reduce the need to select additional computer groups for collection.

   Note:

   Users require role permissions on the content sets of filter groups to use those groups in Reporting. To manage role assignments for users, see Tanium Console User Guide: Managing roles.

   Trends does not limit the number of computer groups that you select as visibility groups. However, Reporting has a limit of 100 computer groups for collection. For more information, see Tanium Reporting User Guide: Select computer groups for data collection.

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- **Trends**: From the Main menu, go to **Modules** > **Trends** > **Overview**, click Settings > **Groups**, and review the selected visibility groups. You can conserve resources by deleting unnecessary visibility groups because Trends periodically collects data from groups. For more information, see Configure visibility groups on page 29.

- **Reporting**: From the Main menu, go to **Data** > **Settings** > **Configuration** and review the selected computer groups. To edit the selections, click **Select Computer Groups**, select or de-select groups, and click **Save**.

4. From the Main menu, go to **Modules** > **Trends** > **Migrate to Reporting**.

5. (Optional) Filter the grid to view only certain boards:

   - **Status**: Click a status to list only the boards that have that status.

     Status filters

Status	Description
Migrated	Migration completed successfully for the board. **Note:** The successful migration status does not change for a board if you make post-migration edits that create error or warning conditions.
Migration not Started	Migration has not started for the board and the board has no issues to review or resolve before migrating.
Warnings and Errors	The board has warning or error conditions. Warnings do not block the migration but might affect the state of the dashboard that the migration creates. You cannot migrate a board that has error conditions until you resolve the conditions.

   - **Date Range**: Filter the grid to list only the boards that were **Created On** a date within the specified range.

   - **Search by text**: Enter a string that contains all or part of a **Trends Board Name**.

6. For each board that has a status or Error or Warning, click Open Side Panel, review

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the errors or warnings, and resolve issues if necessary. The side panel summarizes the conditions in a banner and shows specific messages in the **Sources** and **Sensors** sections.

Pre-migration warnings and errors

Message	Resolution
⚠ Warnings : These conditions do not block the migration.	
Sources : Filters on select sensors cannot be migrated properly and will be ignored.	This condition occurs if the board panel uses a saved question source and the question has filters in its `Get` clause. For example, the **High Memory Usage** source is based on the question `Get?forceComputerIdFlag=1 Memory Consumption > 75 from all machines`, where `> 75` is the filter. You can resolve this condition after the migration, as described in View and update dashboards and reports in Reporting on page 75.
Sources : The source question includes filter groups that will be registered with TDS upon migration.	This condition requires no resolution. When the saved question source uses a question with a filter group that has sensor-defined membership, the migration process automatically registers the sensors with Tanium™ Data Service (TDS). Registration enables Reporting to use the filter group for the associated dashboard. For more information about TDS, see Tanium Interact User Guide: Managing Tanium Data Service (TDS).
⛔ Errors : The migration cannot proceed until you resolve these conditions.	
Sources : Source contains sensors not registered with TDS and cannot be migrated. **Sensors** : Sensor has not been registered with TDS. Any source that leverages this sensor cannot be migrated.	Register the affected sensors with TDS as described in Tanium Interact User Guide: Register or unregister sensors for collection, and then retry the migration.
The following panels cannot be migrated to Reporting because the associated module sources are not available in Reporting. Import the latest versions of the associated	a. From the Main menu, go to **Modules** > **Trends** > **Boards**. b. Expand the board to list its panels and click the name of the affected panel to open it. c. Expand the **Content Sets** section to view the set assignment for the **Source**. Sources are assigned to content sets that are named after the

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Message	Resolution
modules to ensure their sources are available.	associated module. For example, the **Impact Ratings** source is assigned to the **Impact** content set. d. Update the modules that provide the sources, as described in Tanium Console User Guide: Managing Tanium solutions.
The following panels cannot be migrated to Reporting because their associated reports cannot be converted.	Contact Tanium Support on page 83 for help troubleshooting this error.
An error prevented converting the board to a dashboard.	Contact Tanium Support on page 83 for help troubleshooting this error.

Migrate boards

1. From the Main menu, go to **Modules** > **Trends** > **Migrate to Reporting**.
2. Click Migrate for the board that you want to migrate or, to migrate multiple boards, select the checkboxes for those boards and click **Migrate**.
3. Expand each board panel, review its messages, and select resolution options.

Migration warnings and errors

Message	Resolution
(no message)	The board has no issues and is ready for migration.
The following panels have warnings but can be imported: The source question includes filters in the "get" statement, which are not supported for migration to Reporting and will be omitted upon migration.	For each panel that shows this warning, expand the panel and perform the following steps: a. Select whether to **Skip** or **Import** the board. If you select **Skip**, ignore the next step. b. Select whether to **Skip** or **Import** each panel in the board. If you select **Import** and you plan to resolve the issue after migration, record the panel name. You can then add a comparable filter to the report that the migration creates for the corresponding panel in Reporting, as described in View and update dashboards

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Message	Resolution
	and reports in Reporting on page 75.
A dashboard with the same name already exists in your environment	The board was previously migrated. Select an option to resolve the duplication: • **Overwrite Existing**: Overwrites the existing dashboard. • **Import As New**: Creates another dashboard with the same name, while preserving the existing dashboard. • **Rename**: Creates a dashboard with the name that you specify, while preserving the existing dashboard.
Migration to Reporting is prohibited for panels that use sources with sensors that are not registered with TDS.	Perform one of the following tasks based on whether all boards or only some boards have panels with this error: • Some boards: Select whether to **Skip** or **Import** the board that contains the affected panel. If you select **Import**, the migration includes the board but without the affected panel. • All boards: Record the name of the affected sensors, **Cancel** the migration, register the sensors with TDS (see Tanium Interact User Guide: Register or unregister sensors for collection), and retry the migration.

4. Click **Import** when the board is ready for migration.
5. View and update dashboards and reports in Reporting on page 75 after the migration finishes.

View and update dashboards and reports in Reporting

About this task

Perform the following steps for each migrated Trends board to verify that the migration created the corresponding dashboard and associated reports in Reporting, to resolve any errors, and to make optional edits.

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

   Tip: The **Author** column shows the user who migrated each dashboard.

2. Click the **Dashboard Name** of the migrated dashboard to open it. Migrated dashboards have

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the naming convention `Trends - <board>`, where `<board>` is the name of the original board in Trends.

> **Tip:** To find a specific dashboard if the list is long, enter the dashboard name in the **Search by text** field. If you want to list all the dashboards that the migration created, go to the **Labels** pane and select **Trends Migrated**. Record the list if you plan to export the dashboards through Tanium Connect.

3. Verify that the dashboard shows the expected panels and data.

> **Note:** A panel might initially show the message `Collecting initial data` because Reporting starts collecting data for a dashboard chart only when the dashboard is created and the migration does not import data that Trends collected for the chart in the original board. In these cases, you must wait for Reporting to collect the data before that data appears in the chart.

> **Tip:** If you want to edit the dashboard, perform the steps in Tanium Reporting User Guide: Edit a dashboard.

4. If the original Trends board has charts that use saved question sources, click Expand beside the dashboard name and verify that the migration created corresponding **Reports**. The reports provide data for the dashboard charts. The reports have the naming convention `Trends - <source>`, where `<source>` is the name of the original source in Trends.

> **Tip:** To list all the reports that the migration created, go to **Data** > **Reports** and select **Trends Migrated** in the **Labels** pane. Record the list if you plan to export the reports through Tanium Connect. The **Author** column shows the user who performed the migration that created each report. To review the contents of a report, click the **Report Name**. To edit a report, see Tanium Reporting User Guide: Edit reports.

5. (Optional) During the migration, if the **Review Import Warnings** page showed a warning about a source question with filters in the "get" statement, perform the following steps to add the filter to the corresponding report.
    a. In the dashboard, click the report that corresponds to the Trends source.

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b. Add the filter as described in Tanium Reporting User Guide: Use a report or the Explore Data page and click **Save**.

Replace Connect exports

About this task

If any Tanium Connect connections export Trends boards or sources that you migrated, create equivalent connections for the corresponding Reporting dashboards and reports. You must create new connections because you cannot change the source type for existing connections. You can skip the steps to record the names of dashboards and reports if you already recorded the names in View and update dashboards and reports in Reporting on page 75.

1. Record the names of dashboards that you created through migration.
   a. From the Main menu, go to **Data** > **Dashboards**.
   b. In the **Labels** pane, select **Trends Migrated**.
   c. Record the list of migrated dashboards.
2. Record the names of reports that you created through migration.
   a. From the Main menu, go to **Data** > **Reports**.
   b. In the **Labels** pane, select **Trends Migrated**.
   c. Record the list of migrated reports.
3. From the Main menu, go to **Modules** > **Connect** > **Connections**.
4. Record the connection settings for migrated Trends boards.
   a. Expand ▶ the **Filters** section and set the **Source** to **Tanium Trends**.
   b. Expand ▶ each connection to determine if the **Source - Board Name** corresponds to the name of a dashboard. Dashboards that you create through migration have the naming convention `Trends - <board>`, where `<board>` is the name of the original board in Trends and matches the **Source - Board Name**.
   Perform the next sub-step only for connections in which the board name corresponds to a dashboard that you want to export through Connect.
   c. For each connection, click the **Name** to view and record the connection settings.
5. Record the connection settings for migrated Trends sources.
   a. Expand ▶ the **Filters** section and set the **Source** to **Saved Question**.
   b. Expand ▶ each connection to determine if the **Source - Saved Question Name** corresponds to the name of a report. Reports that you create through migration have

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the naming convention `Trends – <source>`, where `<source>` is the name of the original source in Trends and matches the **Source - Saved Question Name**. Perform the next sub-step only for connections in which the source name corresponds to a report that you want to export through Connect.

c. For each connection, click the **Name** to view and record the connection settings.

6. Create a connection for each dashboard and report that you want to export, as described in Tanium Connect User Guide: Reference: Deprecated connection migration.

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Troubleshooting Trends

About this task

Important: Tanium Trends has been deprecated and replaced by Tanium™ Reporting. You can no longer create, import, or edit sources and boards. However, you can still publish, export, delete boards, and enable or disable sources. All new content must be created in Tanium Reporting. Any Trends boards that are still in use must be migrated to Reporting. A migration wizard is available in Trends to assist with migration. For more information about migrating boards, see Migrating Trends boards to Reporting on page 70. For more information about the deprecation, see Tanium Trends Discontinuation and Replacement Notice.

If you encounter unexpected behavior with Trends, use the information contained here to troubleshoot the issue.

Collect logs

About this task

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

1. From the Main menu, go to **Modules** > **Trends** > **Overview** and click Help ? **> Troubleshooting**.
2. Select the solutions for which to gather troubleshooting packages and click **Create Packages**.
   By default, all solutions are selected. When Trends finishes creating the support package, Tanium Console shows a success message, such as `Support package created 2 seconds ago`.
3. Click **Download Support Bundle** when the package is ready.
   ZIP files of all the selected packages download to the local download directory.

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> **Tip:** Some browsers might block multiple downloads by default. Configure your browser to permit multiple downloads from Tanium Console.

4. Contact Tanium Support on page 83 to determine the best option to send the ZIP files.

Result

In addition to any database logs, Trends stores up to the latest 20 Trends service logs. Each service log can contain 10 MB maximum of data, and the total size of all service logs will not exceed 20 MB.

Basic tips

If data is not collected and populated in boards and panels as expected, perform the following tasks to verify that Trends is issuing saved questions and that the questions return results.

- Review the history of Trends saved questions: From the Main menu, go to **Administration** > **Content** > **Question History**.
- Verify that the panel source is not disabled: From the Main menu, go to **Modules** > **Trends** > **Sources** and select **User Defined** or **Managed** sources. A icon indicates that a source is disabled.
- View the source details: From the Main menu, go to **Modules** > **Trends** > **Sources** > **User Defined** and click the **Name** of a source to open it. The **Runs** tab contains logs that show if Trends can successfully collect data from endpoints.

Unable to view or select content

In environments that enable role-based access control (RBAC), users cannot access content to which they do not have permission. Sensors, sources, and boards are among those objects that are managed through RBAC. If you are unable to access sensors, sources, or boards in Trends, make sure your user account has sufficient permission to the content sets to which those objects are assigned.

- You require read permission for a content set to view content in the content set. For example, if you do not have **Sensor read** permission for the **Patch Content Set**, you cannot see Patch sensors as options when building a Trends source.

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- You require write permission for a content set to add, edit, or delete content in the content set. For example, if you do not have the **Trends API Board** write permission for a content set, you cannot edit any boards that are assigned to that content set.
- To see data on a board, you require the **Trends API Board read** permission for the content set that contains the board, and the **Trends Data read** permission for the content sets that contain the sources of the panels on the board.

Errors migrating to Reporting

If Trends boards or sources do not migrate successfully to Reporting dashboards and reports, see View and update dashboards and reports in Reporting on page 75.

Version and disk usage details

If you need to contact Tanium Support to troubleshoot an issue with Trends, you might need to provide your version of Trends and how much disk space Trends uses.

1. From the Main menu, go to **Modules** > **Trends** > **Overview**.
2. Click Information **> About**.

Service unavailable

If the Trends service cannot be reached from Tanium Console, Trends functionality is not available and a message appears. If the problem persists, Contact Tanium Support on page 83.

Uninstall Trends

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

Important: Contact Tanium Support on page 83 before you uninstall or reinstall Trends.

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What happens when you uninstall Trends?

When you uninstall Trends, Tanium Console removes:

- Trends workbench
- Trends-related configuration objects (boards, panels, and saved question sources)
- Trends service

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

- Collected data at <Tanium Module Server>\services\trends-files\
- Trends saved questions (which continue to be reissued)
- Trends module sources (which are removed when you uninstall the corresponding Tanium solutions)
- Trends content sets

Uninstall Trends to enable data restoration 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 Trends, click **Uninstall**.
4. Review the summary and click **Uninstall**.
5. When prompted to confirm, enter your password and click **OK**.

If you later install Trends, the previous data and sources are restored.

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Note: In an active-active deployment, the Trends workbench and Trends menu remain on the cluster member where you did not run the uninstallation process. The Trends workbench must be manually removed from that instance. Contact Tanium Support on page 83 for assistance. For more information about active-active deployments, see Tanium Core Platform User Guide for Windows Deployments: Installing Tanium Server in an Active-Active cluster.

Uninstall Trends to enable a fresh start when you reinstall

1. Uninstall Trends as described in Uninstall Trends to enable data restoration when you reinstall on page 82.
2. Manually delete the following items:
    - Trends files at <Tanium Module Server>\services\trends-files\
    - Trends saved questions (through **Administration** > **Content** > **Saved Questions**)

If you later install Trends and import the gallery, no data collected for saved question sources is preserved from previous installations.

Contact Tanium Support

About this task

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

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

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Reference: Chart options in Trends

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Panels use charts to visually display results returned by Trends questions. You can find the following types of charts in Trends, in addition to the possible date ranges that a chart can display.

Chart types

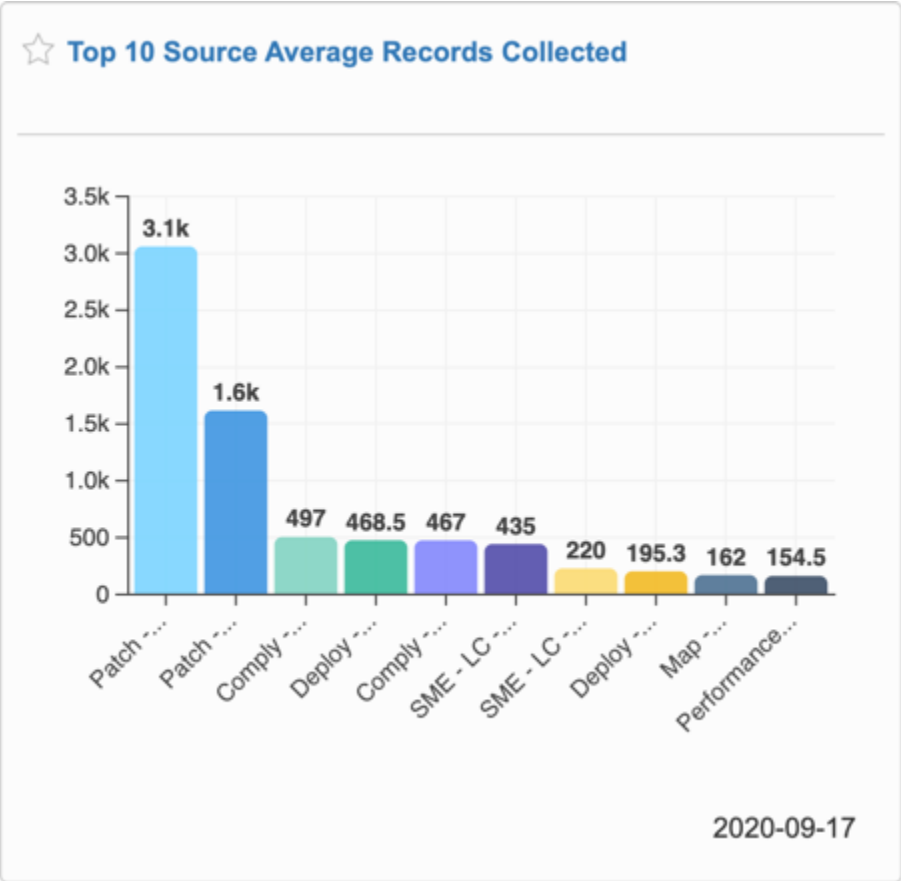
Panels can use the following chart types to visually display results collected by the source for the panel.

Bar chart

The bar chart, or histogram, displays data for a single day. Use a bar chart when you want to compare two or more results, such as comparing browser versions or operating systems. In contrast to donut charts, the parts of a bar chart do not necessarily add up to a whole.

Figure 1. Example of a bar chart

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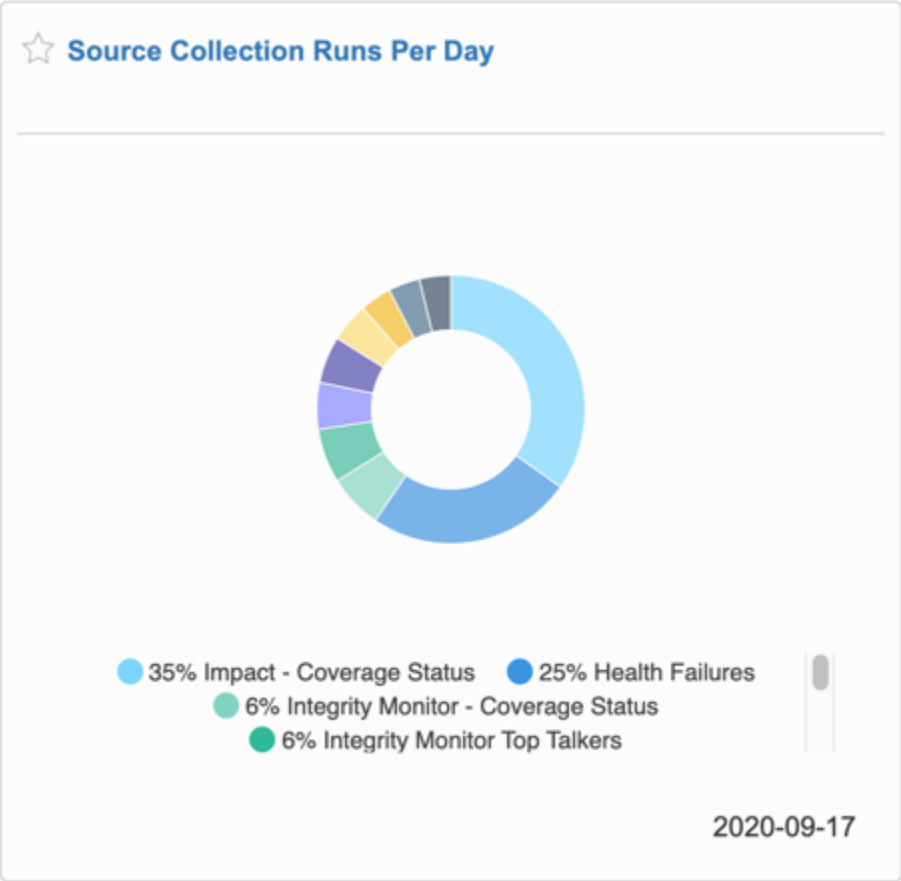


Donut chart

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

Figure 2. Example of a donut chart

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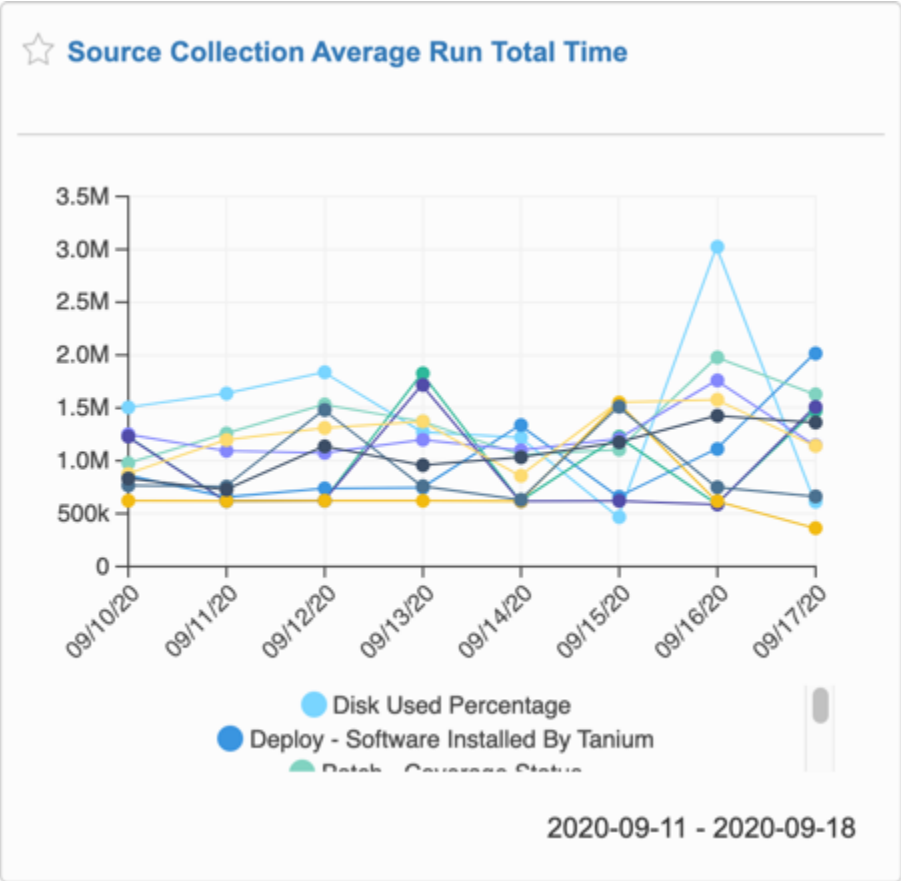


Line chart

The line chart is a historical chart that shows data over multiple days. Use the line chart when you compare values over time.

Figure 3. Example of a line chart

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Number chart

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

Figure 4. Example of a number chart

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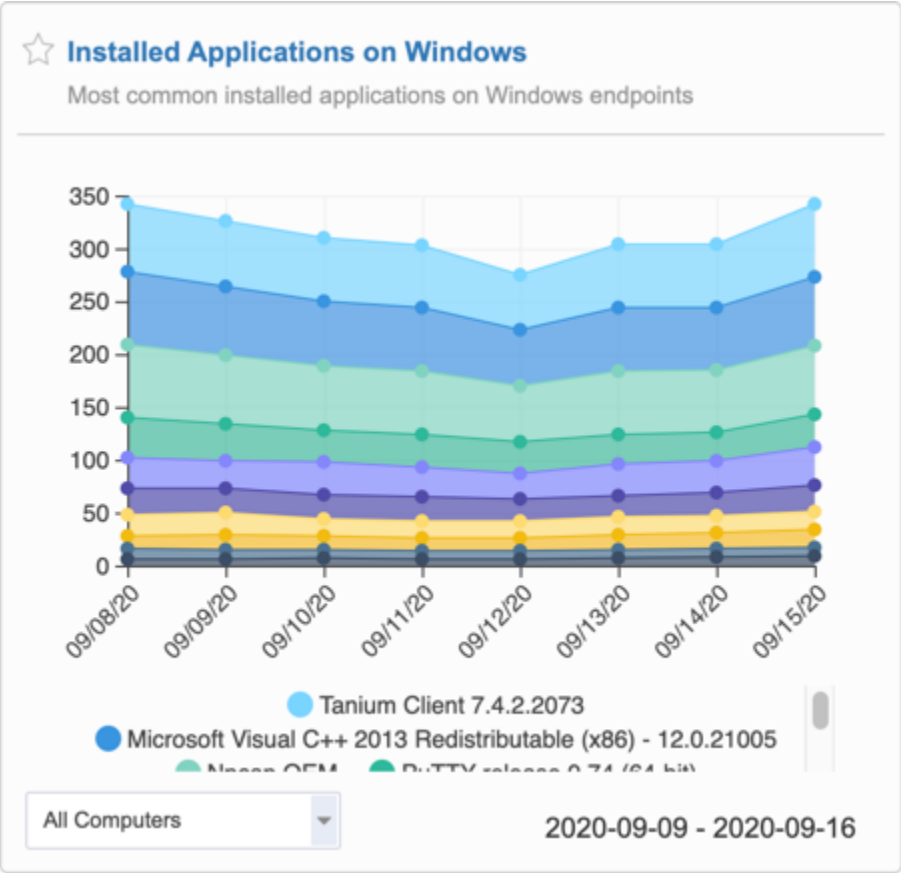


Stacked area chart

The stacked area chart is a historical chart that shows data over multiple days. Use the stacked area chart when you want to sort and compare changes over time, such as displaying running applications on the endpoints. Hover over the graph to display the count for each result by date.

Figure 5. Example of a stacked area chart

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Date options

The date options that you can set for a chart depend on the type of chart.

- Single-day charts, such as donut charts and bar charts, display a single day of data.
- Historical charts, such as stacked area charts and line charts, display a date range.

Date options for single-day charts

Date options for single-day charts

Option	Time Interval	Description
Custom	-	Select a day to view results from the last time Trends collected data on that day.

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Option	Time Interval	Description
Latest data	-	Results from the last time Trends collected data for the source. The user interface shows the date of collection (UTC time). This is the only available option for a single-day chart that uses an hourly module source.
Today	Day	Results from the last time Trends collected data on the current day (UTC time).
Yesterday	Day	Results from the last time Trends collected data on the previous day (UTC time).
This day last week	Day	Results from the last time Trends collected data one week ago (UTC time).
This day last month	Day	Results from the last time Trends collected data one month ago (UTC time).
This day last quarter	Day	Results from the last time Trends collected data three months ago (UTC time).

Date range options for historical charts

Date range options for historical charts

Option	Time Interval	Description
Custom	-	Select the start date and end date of a date range. The start date and end date cannot be the same date.
This week	Day	Daily results beginning with the most recent Sunday through the current day.
This month	Day	Daily results beginning with the first of the month through the current day.
This	Day	Daily results for a quarter beginning January 1st, April 1st, July 1st, or October 1st, through the current

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Option	Time Interval	Description
quarter		day.
Last week	Day	Daily results beginning with the previous Monday through the most recent Sunday.
Last month	Day	Daily results for the previous month.
Last quarter	Day	Daily results for the previous quarter. A quarter is January 1st to March 31, April 1st to June 30th, July 1st to September 30, or October 1st to December 31st.
Last 7 days	Day	Last 7 daily results, including the current day.
Last 30 days	Day	Last 30 daily results, including the current day.
Last 90 days	Day	Last 90 daily results, including the current day.
Last 4 hours	Hour	Last 4 hourly results, including the current hour.
Last 12 hours	Hour	Last 12 hourly results, including the current hour.
Last 24 hours	Hour	Last 24 hourly results, including the current hour.

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Reference: Trends data collection for saved question sources

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Learn how saved question sources collect data so that the panels you design in Trends appropriately display the results that you want to analyze.

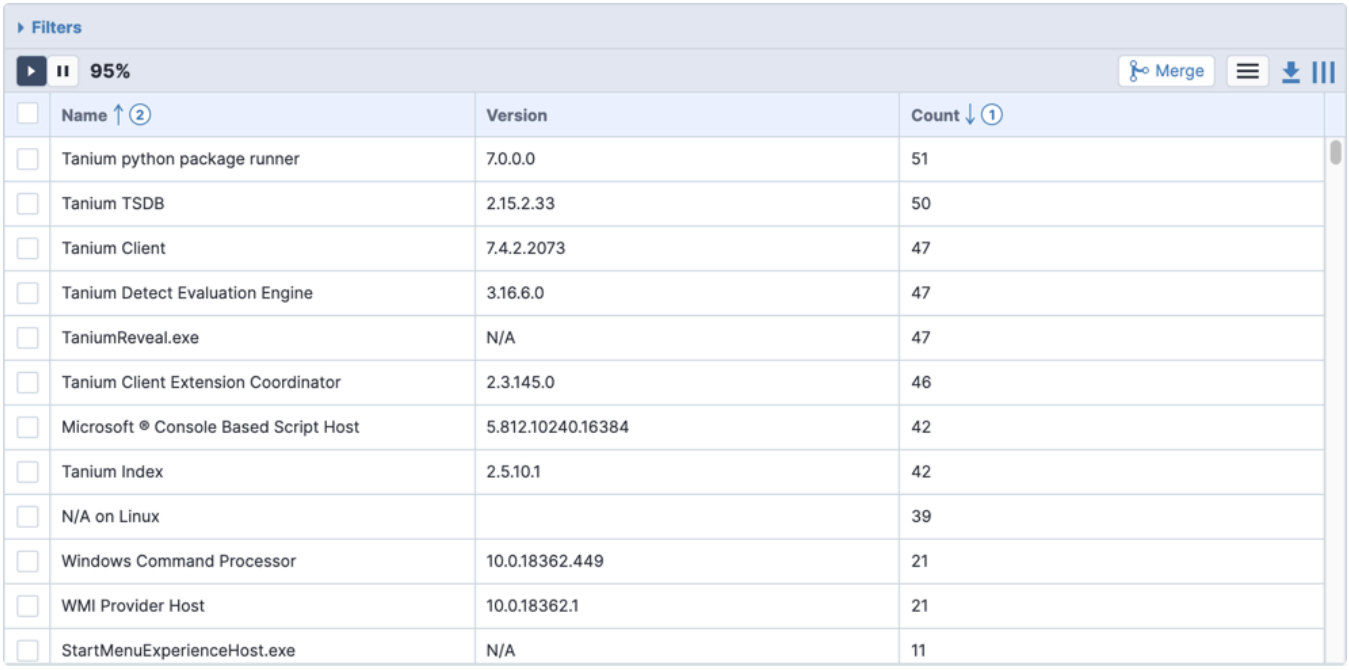
Types of sensors

A saved question in a saved question source can ask for results from one sensor. The sensor can be a single column sensor, a multicolumn sensor, or a parameterized sensor. If you use a multicolumn sensor, you must choose the result column (field) to use when you create a panel that uses the corresponding saved question source.

Trends stores results as counts of the answers returned when sensors run on the Tanium Client. Most sensors return numeric results that can be meaningfully counted. For example, the question `Get Running Applications from all machines` returns counts of the application versions found in running processes on endpoints.

Figure 6. Results grid counts

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Name	Version	Count
Tanium python package runner	7.0.0.0	51
Tanium TSDB	2.15.2.33	50
Tanium Client	7.4.2.2073	47
Tanium Detect Evaluation Engine	3.16.6.0	47
TaniumReveal.exe	N/A	47
Tanium Client Extension Coordinator	2.3.145.0	46
Microsoft ® Console Based Script Host	5.812.10240.16384	42
Tanium Index	2.5.10.1	42
N/A on Linux		39
Windows Command Processor	10.0.18362.449	21
WMI Provider Host	10.0.18362.1	21
StartMenuExperienceHost.exe	N/A	11

When you create a saved question source in Trends, the Question Builder is available to build the saved question. Before you save the saved question source, you can run the question to preview the results. Evaluate whether the result strings can be meaningfully counted and whether question filters are required. Avoid using questions that return unique strings, such as Computer Name or IP address, because there is little value in aggregate counts of these answers. If a source returns more than 100,000 unique results in a day, Trends only stores the 100,000 results with the highest counts.

How Trends collects data

When the Tanium Server issues a saved question for a saved question source, the results are temporarily stored in the Tanium Server cache. When a source collection is initiated, Trends retrieves the cached results, aggregates the results as single day counts, and stores the data in a dedicated Trends database on the Module Server.

For each saved question source, you can configure how often to issue the saved question, and how often to collect the data from the Tanium Server cache. When Trends collects the data, Trends aggregates the data and updates any panels that use the source. You can find these settings in the **Source Intervals** section when you create or edit a source:

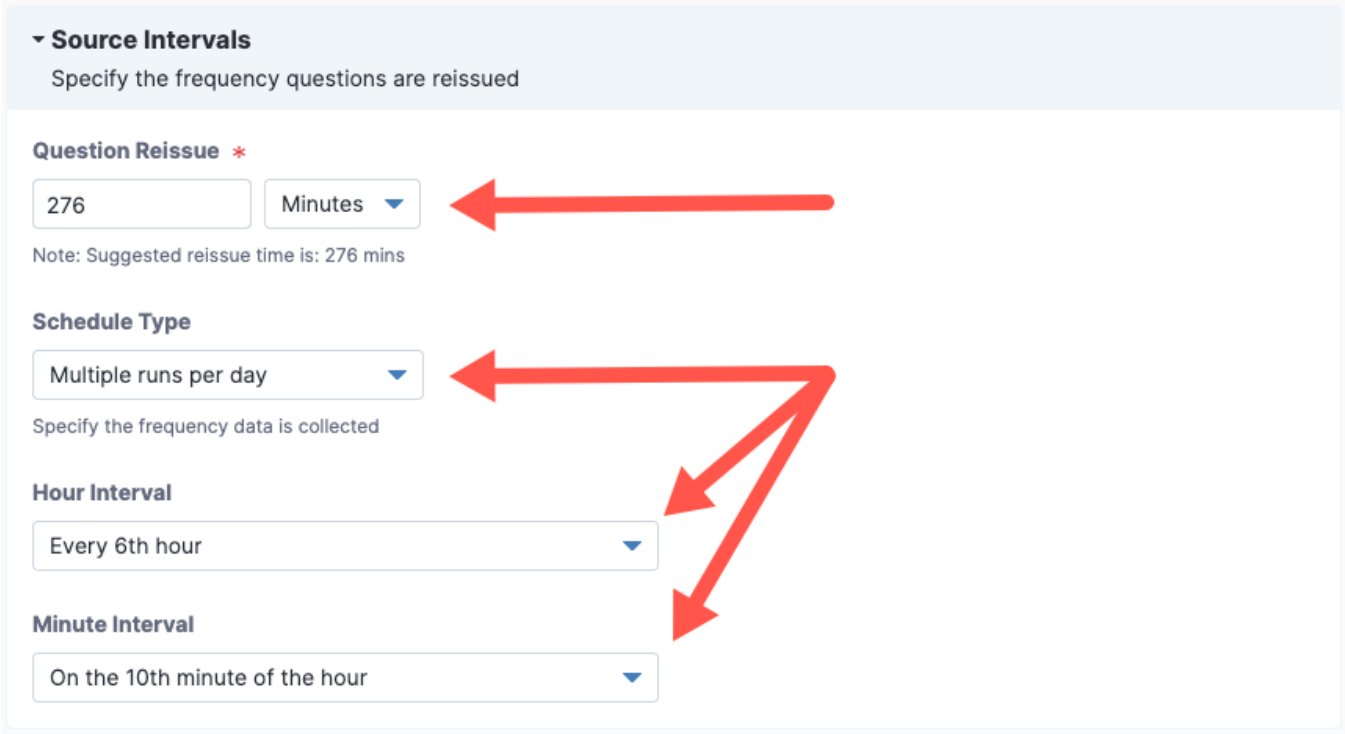
- **Question Reissue**: How often to issue the saved question.
- **Schedule Type**: How often to collect data from the Tanium Server. You can choose to collect once per day, multiple times each day, or multiple times each hour. Additional scheduling

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options appear depending on your selection.

Tip: The process of collecting data from the Tanium Server is also called a *run*, *source run* or *collection*.

Figure 7. Collection settings for a saved question source



For each source, Trends only stores one set of results for each endpoint for a one day period. If a source issues a saved question multiple times in a day, Trends stores the latest results of the saved question for each endpoint. For most sources, you should reissue the saved question approximately every five hours and collect the data every 24 hours. This frequency is intended to get responses from endpoints that are offline sometimes during a one day period, but are online at one of the times the saved question is issued. When Trends collects data for a saved question source, Trends issues the saved question one more time to get the most recent results.

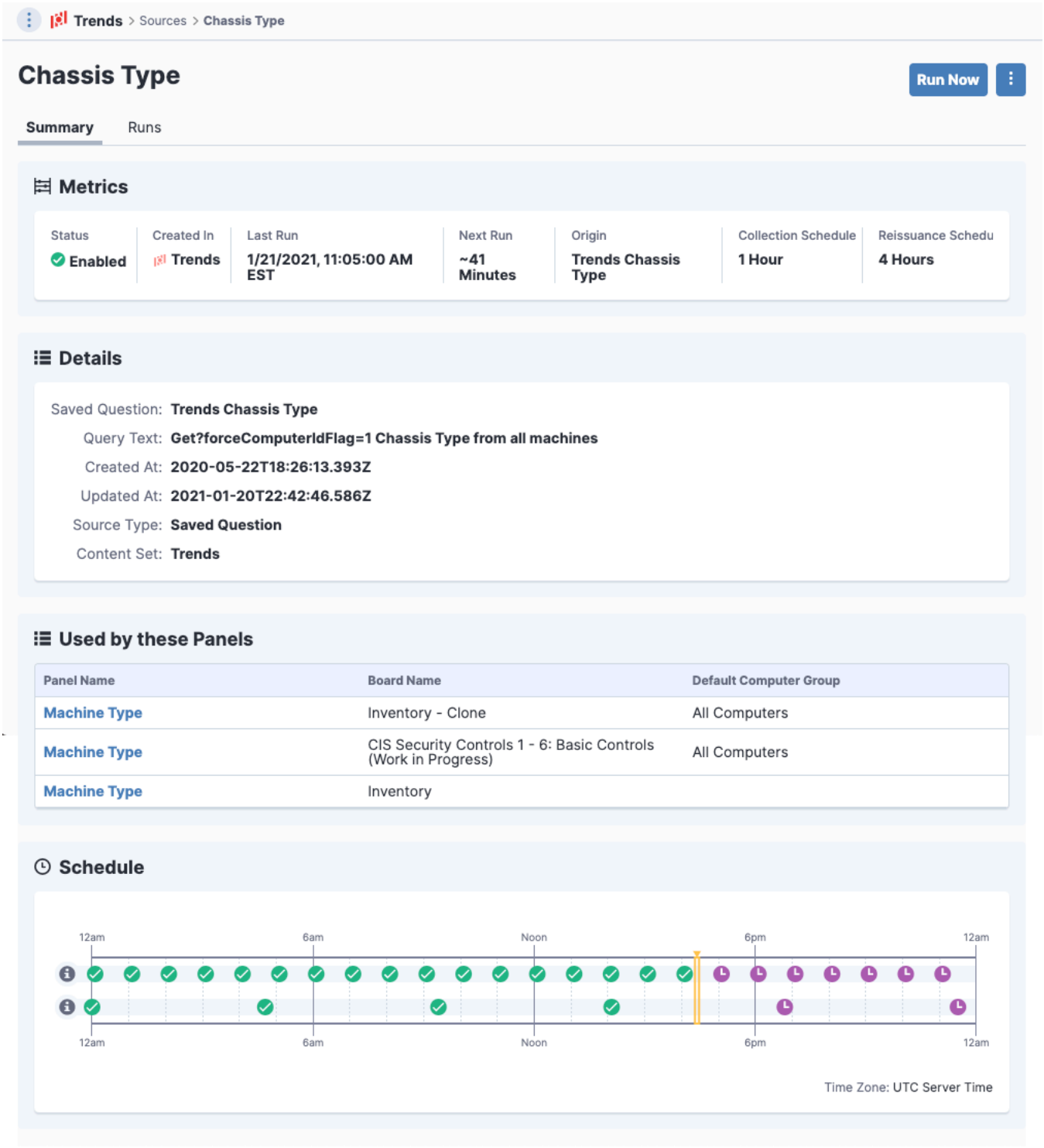
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Note: Tips:

- If endpoints are online during shorter time periods, decrease the **Question Reissue** setting to reissue the saved question more frequently.
- The frequency to collect data largely depends on how often you want to access the information in Trends, and how often you expect the data to change. If you need to view updated data in the charts multiple times per day, either set a more frequent collection schedule or manually collect data through the **Run Now** button for the underlying source.
- If your charts display counts from **Online and most recent offline** endpoints, consider a lower collection frequency. For more information, see Answers from online and offline endpoints on page 97.

Figure 8. Source details

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Trends collects data for each saved question source with minor offsets to avoid traffic spikes. If Trends collects data at an unsuitable time, you can edit the saved question source to change the collection schedule. For optimal results, saved question sources should collect results on a routine schedule to maintain similar comparisons. For example, measuring running applications every day at noon provides more accurate data to compare than if you measure running applications some days at noon and some days at midnight.

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Note: If a scheduled run fails, you can manually run the saved question source to issue the question and collect results. If results are collected more than once a day, the daily count resolves to the last data that Trends collects that day. For more information, see Working with sources on page 38.

Results are reported in Trends as aggregate single day counts based on the timestamps of the collected data. The time and date clock is based on the UTC time of the Module Server (not the local time zone adjusted time). For example, a panel configured to show Chassis Type on December 31 includes the counts of the responses that Trends collects on December 31 UTC time.

Answers from online and offline endpoints

The Tanium Client is deployed to a broad spectrum of enterprise assets, including infrastructure servers, employee workstations, and employee laptops. Each of these assets is an endpoint that may be online or offline. While infrastructure servers are almost always online, employee workstations or laptops may be online or offline according to employee schedules and habits.

When the Tanium Server issues a saved question, an endpoint that is online sends its current response to the question; if the endpoint is offline, the Tanium Server may have a recent value for it. The Tanium Server tallies counts for both types of answers.

The online and offline statuses relate to the time when Trends collected results, not the present time. For example, Trends collects data at 9:00 UTC for a source that queries `Get Reboot Required from all machines`, and the data for **Online clients** and **Online and most recent offline clients** are tallied at that point in time. **Online clients** are endpoints that responded to the question within the last 24 hours. **Online and most recent offline clients** are endpoints that responded within the last week.

Note that the time of day that Trends collects data might impact the count recorded, depending on business practices such as maintenance operations. For example, if Trends collects data for a source at 2:00 UTC, and 2:00 UTC is during a daily maintenance window where maintenance processes might put more machines in a state requiring reboot, then the counts for `Get Reboot Required from all machines` would routinely be higher.

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Reference: Trends user role scenarios

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In Trends 3.0 or later, you can use Tanium role-based access control (RBAC) to restrict access to boards and sources that appear in Trends and other Tanium solutions. Using RBAC for Trends boards is optional; by default, all Trends boards and sources are available to all users with predefined Trends roles.

If you decide to use RBAC, use a development environment to set up RBAC and test access to restricted content. Make sure that users with proper permissions can access restricted content, and that users without permission cannot access the restricted content. Do not test with users that have the Trends Administrator permission, because those users have unrestricted access to all boards and sources.

Set up a content set for testing

1. Create a content set named **Trends Sandbox**.
2. Create a module role named **Trends Sandbox User**.
3. Assign the following Trends permissions to **Trends Sandbox User**.
    - To emulate a Trends Author on the **Trends Sandbox** content set:
        - Show Trends
        - **Trends Data** read on the **Trends Sandbox** content set

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        - **Trends API Board** read on the **Trends Sandbox** content set
        - **Trends API Board** write on the **Trends Sandbox** content set
        - **Trends API Source** read on the **Trends Sandbox** content set
        - **Trends API Source** write on the **Trends Sandbox** content set
    - To emulate a Trends Board Viewer on the Trends Sandbox content set:
        - Trends

          show
        - **Trends Data** read on the **Trends Sandbox** content set
        - **Trends API Board** read on the **Trends Sandbox** content set
4. Assign the **Trends Sandbox User** role to your test users.

   If you do not want the users to see default Trends content, only grant the users the **Trends Sandbox User** role and do not assign them any predefined Trends roles.
5. Create sources and boards in Trends and assign them to the **Trends Sandbox** content set.

   If no author roles exist, create sources and boards with a Trends Administrator account that can assign the sources and boards to the **Trends Sandbox** content set.

Example 1

A user needs to view and create boards, sources, and panels for a particular content set, but without unnecessary permissions that module roles provide. For instance, you can give a user permission to the **Patch** content set, without also providing permission to the Patch workbench.

- Create an **Advanced Role**:
    - Enable **Ask Dynamic Questions**.
    - Add **Sensor** read permission and grant the applicable content set.
    - Add **Saved Question** write permission and grant the applicable content set.

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- Create a **Grant Module Role**:
    - Add **Trends** show permission.
    - Add **Trends API Board** read permission and grant the applicable content set.
    - Add **Trends API Board** write permission and grant the applicable content set.
    - Add **Trends API Source** read permission and grant the applicable content set.
    - Add **Trends API Source** write permission and grant the applicable content set.
    - Add **Trends Data** read permission and grant the applicable content set.
- Add both roles to the user or user group.

Example 2

Grant permission to a module user to read and write boards and sources in a content set.

- Create a **Grant Module Role**:
    - Add **Trends** show permission.
    - Add **Trends API Board** read permission and grant the applicable content set.
    - Add **Trends API Board** write permission and grant the applicable content set.
    - Add **Trends API Source** read permission and grant the applicable content set.
    - Add **Trends API Source** write permission and grant the applicable content set.
    - Add **Trends Data** read permission and grant the applicable content set.
- Add the new role to the user or user group.

Example 3

Grant a user view-only permission to boards and sources in a content set.

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- Create a **Grant Module Role**:
    - Add Trends show permission.
    - Add **Trends API Board** read permission and grant the applicable content set.
    - Add **Trends Data** read permission and grant the applicable content set.
- Add the new role to the user or user group.

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