



Tanium™ Engage User Guide

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Engage overview

With Engage, you can create surveys to collect qualitative feedback from endpoint users and deploy remediations to correct problems on the endpoints.

Surveys

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

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

Answer types

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

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

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

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

Targeting

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

The targeting for a survey is a computer group, which is a set of endpoints that you want to manage together. You might have existing computer groups to target surveys, or you might want to create new computer groups for surveys. The user that creates the survey must have management rights to this computer group. To assign computer groups to a user, see [Tanium Platform User Guide: Manage computer group assignments for a user](#).

When you publish a survey, the survey is running in the background on each targeted endpoint. However, the end users of the endpoint do not see the survey until the trigger conditions for the survey are met. Trigger conditions define a sensor or metric threshold that must be met to display the survey on the endpoint.

Remediations

You can configure one remediation per survey. A remediation is attached to a question answer in the last question of the survey, and can open a link or deploy an action to the endpoint.

Multiple choice questions can have a package or link remediation. Sentiment questions can contain only a link remediation.

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

You can choose from the default remediation tasks, or create your own tasks. See [Creating remediation tasks on page 30](#).

Default remediation tasks

Restart Endpoint

Restarts the target device.

Clear Microsoft Teams Cache

Clears cache to resolve problems with Microsoft Teams.

Clear DNS Cache

Clears DNS cache to help resolve network issues.

Enable / Disable Fast Start

Enables or disables the Windows OS Fast Start feature.

Restart <application>

Restarts the Cisco Webex, Google Chrome, Microsoft Edge, Microsoft Outlook, Microsoft Teams, Mozilla Firefox, Slack, or Zoom application.

User Disk Cleanup

Performs light (Recycle bin empty) clean.

Interoperability with other Tanium products

Engage works with other Tanium products.

Directory Query

Engage uses Tanium™ Directory Query to collect user attributes for survey results. For more information, see [Tanium Directory Query](#).

End-User Notifications

Engage uses Tanium™ End-User Notifications to notify users about surveys. For more information, see [Install and configure Tanium End-User Notifications on page 18](#).

Endpoint Configuration

Engage uses Tanium™ Endpoint Configuration to deploy remediation tasks to endpoints. For more information, see [Install and configure Tanium Endpoint Configuration on page 18](#).

Performance

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

Reporting

Engage uses Tanium™ Reporting to create the charts on the Engage **Overview** page. For more information, see [Tanium Reporting](#).

Engage requirements

Review the requirements before you install and use Engage.

Core platform dependencies

Make sure that your environment meets the following requirements:

- Tanium license that includes Engage
- Tanium™ Core Platform servers 7.5.6.1052 or later
- Tanium™ Client 7.4.1.1955 or later

Computer group dependencies

When you first sign in to the Tanium Console after a fresh installation of Tanium Server, the server automatically imports the **ALL Windows Workstations** computer group.

Solution dependencies

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



NOTE

Some Engage dependencies have their own dependencies, which you can see by clicking the links in the lists of [Required dependencies on page 9](#) and [Feature-specific dependencies on page 10](#). Note that the links open the user guides for the latest version of each solution, not necessarily the minimum version that Engage requires.

Tanium recommended installation

If you select **Tanium Recommended Installation** when you import Engage, the Tanium Server automatically imports all your licensed solutions at the same time. See [Tanium Console User Guide: Import all modules and services](#).

Import specific solutions

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

Required dependencies

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

- Tanium™ [Endpoint Configuration](#) 1.7.202 or later
- Tanium™ [Interact](#) 2.14.118 or later
- Tanium [End-User Notifications](#) 1.15.54 or later
- Tanium [Performance](#) 1.14.212 or later
- Tanium™ System User Service 1.0.77 or later
- Tanium™ RDB 1.2.173 or later
- Tanium™ [Reporting](#) 1.28.53 or later

Feature-specific dependencies

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

- Tanium [Directory Query](#) 1.1.26 or later, to collect user attributes to display in survey results.

Client extensions

Tanium Endpoint Configuration installs client extensions for Engage on endpoints. Client Extensions perform tasks that are common to certain Tanium solutions. The Tanium Client uses code signatures to verify the integrity of each client extension prior to loading the extension on the endpoint. Each client extension has recommended security exclusions to allow the Tanium processes to run without interference. See [Security exclusions](#) for more information. The following client extensions perform Engage functions:

- End User CX - Provides a mechanism to send surveys to collect qualitative feedback from endpoint users. Tanium Engage installs this client extension.

Tanium™ Module Server

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

For information about Module Server sizing in a Windows deployment, see [Tanium Core Platform Deployment Guide for Windows: Host system sizing guidelines](#).

Endpoints

Supported operating systems

The following endpoint operating systems are supported with Engage.

- Windows

Host and network security requirements

Specific ports and processes are needed to run Engage.

Ports

The following ports are required for Engage communication.

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



BEST PRACTICE

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

Security exclusions

If security software is in use in the environment to monitor and block unknown host system processes, Tanium recommends that a security administrator create exclusions to allow the Tanium processes to run without interference. The configuration of these exclusions varies depending on AV software. For a list of all security exclusions to define across Tanium, see [Tanium Core Platform Deployment Reference Guide: Host system security exclusions](#).

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

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

Engage security exclusions for endpoints

Endpoint OS	Notes	Exclusion Type	Exclusion
Windows		File	<Tanium Client>\extensions\taniumenduser.dll
	7.4.x clients	Process	<Tanium Client>\python38\python.exe
	7.4.x clients	Folder	<Tanium Client>\python38
		Folder	/Library/Tanium/EndUserNotifications



IMPORTANT

You must also apply [End-User Notifications](#) exclusions for Windows endpoints.

User role requirements







The following tables list the role permissions required to use Engage. To review a summary of the predefined roles, see [Set up Engage users on page 19](#).

For more information about role permissions and associated content sets, see [Tanium Console User Guide: Managing RBAC](#).

Engage user role permissions

Permission	Engage Administrator 1,3,4	Engage Operator ^{1,3,4}	Engage Question Author ^{1,3,4}	Engage Remediation Author ^{1,3}	Engage User ^{1,3}	Engage Service Account ^{3,4}
Engage View the Engage workbench	✓ SHOW	✓ SHOW	✓ SHOW	✓ SHOW	✓ SHOW	✓ SHOW
Engage Questions Read and write access to Engage survey questions	✓ READ WRITE	✓ READ WRITE	✓ READ WRITE	✓ READ	✓ READ	✗
Engage Remediations Read and write access to the Engage remediations	✓ READ WRITE	✓ READ WRITE	✓ READ	✓ READ WRITE	✓ READ	✗
Engage Service Account Operate the Engage service	✗	✗	✗	✗	✗	✓ EXECUTE
Engage Settings Write access to platform settings in the Engage module	✓ WRITE	✓ WRITE	✗	✓ READ	✓ READ	✓ READ WRITE

Engage user role permissions (continued)

Permission	Engage Administrator 1,3,4	Engage Operator ^{1,3,4}	Engage Question Author ^{1,3,4}	Engage Remediation Author ^{1,3}	Engage User ^{1,3}	Engage Service Account ^{3,4}
Engage Surveys Read and write access to Engage surveys	 AUTHOR OVERRIDE READ WRITE	 AUTHOR OVERRIDE READ WRITE	 READ	 READ	 AUTHOR READ WRITE	































¹ This role provides module permissions for Tanium Reporting. You can view which Reporting permissions are granted to this role in the Tanium Console. For more information, see [Tanium Reporting User Guide: User role requirements](#).

² This role provides module permissions for Tanium Endpoint Configuration. You can view which Endpoint Configuration permissions are granted to this role in the Tanium Console. For more information, see [Tanium Endpoint Configuration User Guide: User role requirements](#).































³ This role provides module permissions for Tanium Interact. You can view which Interact permissions are granted to this role in the Tanium Console. For more information, see [Tanium Interact User Guide: Tanium Data Service permissions](#).

⁴ Grants access to content in the Engage content set.

Provided Engage administration and platform content permissions

Permission	Permission Type	Engage Administrator ¹	Engage Operator	Engage Question Author	Engage Remediation Author	Engage User	Engage Service Account
Action Group	Administration						 READ WRITE
Computer Group	Administration	 READ	 READ	 READ	 READ	 READ	 READ
Import Signed Content	Administration						 SPECIAL
Global Settings	Administration						 READ
Action	Platform Content	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹ WRITE ¹

Provided Engage administration and platform content permissions (continued)

Permission	Permission Type	Engage Administrator ¹	Engage Operator	Engage Question Author	Engage Remediation Author	Engage User	Engage Service Account
Filter Group	Platform Content	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹
Own Action	Platform Content	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹
Package	Platform Content	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹
Plugin	Platform Content	 READ ¹	 READ ¹ EXECUTE ¹	 READ ¹ EXECUTE ¹	 READ ¹ EXECUTE ¹	 READ ¹ EXECUTE ¹	 READ ¹ EXECUTE ¹
Sensor	Platform Content	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹	 READ ¹

To view which content set permissions are granted to a role, see [Tanium Console User Guide: View effective role permissions](#).

¹ Grants access to content in the Engage content set only.

Optional roles for Engage

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

Getting started with Engage

Follow these steps to configure and use Engage.

Step 1: Configure Engage

1. See [Configuring Engage on page 18](#) for information about setting up Engage.
2. Control access to the platform and products by assigning users to groups and roles. See [Tanium Console User Guide: RBAC overview](#) and [Configuring Engage on page 18](#).

Step 2: Create and schedule surveys

You can create a survey that includes remediations for the end user to help solve problems with their endpoint. You can run and re-run surveys for specific time periods. See [Creating surveys on page 22](#).

If you are including a remediation in your survey, you can create custom remediation tasks in addition to using the default tasks that are provided. See [Creating remediation tasks on page 30](#).

Step 3: Analyze results

After your surveys have run, you can look at results. For more information, see [View survey results on page 25](#) and [Understanding employee sentiment on page 27](#).

Installing Engage

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

- **Automatic configuration with default settings** (Tanium Core Platform 7.4.2 or later only): Engage is installed with any required dependencies and other selected products. After installation, the Tanium Server automatically configures the recommended default settings. This option is the best practice for most deployments. For more information about the automatic configuration for Engage, see [Import Engage with default settings on page 16](#).
- **Manual configuration with custom settings:** After installing Engage, you must manually configure required settings. Select this option only if Engage requires settings that differ from the recommended default settings. For more information, see [Import Engage with custom settings on page 17](#).

Before you begin

- Read the [release notes](#).
- Review the [Engage requirements on page 9](#).
- Assign the correct roles to users for Engage. Review the [User role requirements on page 12](#).
 - To import the Engage solution, you must be assigned the Administrator reserved role.
 - To configure the Engage action group, you must be assigned the Administrator reserved role, Content Administrator reserved role, or a role that has the **Action Group** write permission.

Import Engage with default settings

(Tanium Core Platform 7.4.5 or later only) You can set the Engage action group to target the **No Computers** filter group by enabling restricted targeting before importing Engage. This option enables you to control tools deployment through scheduled actions that are created during the import and that target the Tanium Engage action group. For example, you might want to test tools on a subset of endpoints before deploying the tools to all endpoints. In this case, you can manually deploy the tools to an action group that you configured to target only the subset. To configure an action group, see [Tanium Console User Guide: Managing action groups](#). To enable or disable restricted targeting, see [Tanium Console User Guide: Dependencies, default settings, and tools deployment](#).

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

Setting	Default value
Action group	<ul style="list-style-type: none">• Restricted targeting disabled (default): <code>All Windows Workstations</code> computer group• Restricted targeting enabled: <code>No Computers</code> computer group

To import Engage and configure default settings, see [Tanium Console User Guide: Import all modules and services](#). After the import, verify that the correct version is installed: see [Installing Engage on page 16](#).

Import Engage with custom settings

To import Engage without automatically configuring default settings, be sure to clear the **Apply All Tanium recommended configurations** check box while performing the steps in [Tanium Console User Guide: Import, re-import, or update specific solutions](#). After the import, verify that the correct version is installed: see [Installing Engage on page 16](#).

To configure the service account, see [Configuring Engage on page 18](#).

To organize computer groups, see [Organize computer groups on page 19](#).

To configure the Engage action group, see [Configure the Engage action group on page 19](#).

Manage solution dependencies

Other Tanium solutions are required for Engage to function (required dependencies) or for specific Engage features to work (feature-specific dependencies). See [Solution dependencies](#).

Upgrade Engage

For the steps to upgrade Engage, see [Tanium Console User Guide: Import, re-import, or update specific solutions](#). After the upgrade, verify that the correct version is installed: see [Installing Engage on page 16](#).

Troubleshoot issues

If you experience issues with installing Engage, see [Troubleshooting Engage on page 34](#).

Configuring Engage

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

Install and configure Tanium Endpoint Configuration

Manage solution configurations with Tanium Endpoint Configuration


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



For information about installing Endpoint Configuration, see [Tanium Endpoint Configuration User Guide: Installing Endpoint Configuration](#).

Optionally, you can use Endpoint Configuration to require approval of configuration changes. When configuration approvals are enabled, Endpoint Configuration does not deploy a configuration change to endpoints until a user with approval permission approves the change. For information about the roles and permissions that are required to approve configuration changes for Engage, see [User role requirements on page 12](#). For more information about enabling and using configuration approvals in Endpoint Configuration, see [Tanium Endpoint Configuration User Guide: Managing approvals](#).



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

For more information about Endpoint Configuration, see [Tanium Endpoint Configuration User Guide](#).

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

- Creating, updating, or deleting surveys

Install and configure Tanium End-User Notifications

Tanium End-User Notifications is a shared service that is used to send notifications to users, including sending the Engage surveys. You must configure end-user notifications and customize the End-User Self Service interface before you configure Engage. For more information, see [Tanium End-User Notifications User Guide: Configuring](#) and [Tanium End-User Notifications User Guide: Customizing](#)

[the End-User Self Service interface](#). Configure any exclusions that are listed in the [Tanium End-User Notifications User Guide: Security Exclusions](#). You can customize the self service interface to match your corporate branding.

Configure Engage

Configure the Engage action group

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

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

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



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

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

Organize computer groups

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

For more information, see [Tanium Core Platform User Guide: Managing computer groups](#).

Set up Engage users

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

To review specific permissions for each role, see [User role requirements on page 12](#).



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

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

Engage Administrator

Assign the **Engage Administrator** role to users who manage the configuration and deployment of Engage functionality to endpoints.

This role can perform the following tasks:

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

Engage Operator

Assign the **Engage Operator** role to users who manage the configuration and deployment of Engage functionality to endpoints.

This role can perform the following tasks:

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

Engage Question Author

Assign the **Engage Question Author** role to users who need to create surveys and survey question templates.

This role can perform the following tasks:

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

Engage Remediation Author

Assign the **Engage Remediation Author** role to users who need to create surveys and survey question templates.

This role can perform the following tasks:

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

Engage Read Only User

Assign the **Engage Read Only User** role to users who need visibility into Engage data.

This role can perform the following tasks:

- View surveys, remediations, and questions.
- View settings.

Engage Service Account

Assign the **Engage Service Account** role to the account that configures system settings for Engage. This role can perform several background processes for Engage.



NOTE

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

Creating surveys

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

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

Create survey

1. From the Engage menu, go to **Surveys**. Click **Create Survey**.
2. Give the survey a title and description. The title displays to the user in the notification on the endpoint.
3. Define trigger conditions. A trigger condition defines when the end user of the endpoint gets prompted to take the survey. The trigger condition can be based on a Tanium sensor or performance metric. Click **Add Condition**, then click **+ Row** or **+ Group** to define the trigger condition. Click **Apply** to save the condition, then click **Save**. Specify the **Minimum time between survey notifications**, which is an amount of time between survey notifications that the user receives on the endpoint, in hours. By default, the survey notification is every 24 hours.
4. Add survey questions. Click **Add Survey Questions**. You can either create a new question or select an existing question template. If you create a new question while you are creating the survey, you can add the question to this survey only, or save the question as a template. For more information about managing question templates, see [Create question templates on page 26](#).
5. If you are creating a question, you can add the question details, and text.

6. Create answers to the question. Choose between multiple choice or sentiment score answer types:

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

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

The sentiment score is calculated on a 1-5 Likert scale rating about the user's feelings (5: Strong Positive, 1: Strong Negative).

The overall sentiment score is a scaled average of all sentiment score questions across all surveys that have sentiment questions, and gets a rating based on the following calculations:

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

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



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

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

Restart Endpoint

Restarts the target device.

Clear Microsoft Teams Cache

Clears cache to resolve problems with Microsoft Teams.

Clear DNS Cache

Clears DNS cache to help resolve network issues.

Enable / Disable Fast Start

Enables or disables the Windows OS Fast Start feature.

Restart <application>

Restarts the Cisco Webex, Google Chrome, Microsoft Edge, Microsoft Outlook, Microsoft Teams, Mozilla Firefox, Slack, or Zoom application.

User Disk Cleanup

Performs light (Recycle bin empty) clean.



You can also create custom remediation tasks from another Tanium package. For more information, see [Creating remediation tasks on page 30](#).

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

Schedule survey run

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






1. From the Engage menu, go to **Surveys**. Click the name of the survey that you want to schedule. The survey must be in **Draft** or **Done** status.
2. If the survey is in **Draft** status, click **Schedule** and **Run Survey**. If the survey is in **Done** status, click **Run Survey** again.

3. Edit the schedule. You can schedule a survey to run one time, or ongoing. You can also schedule a survey to run immediately or on a scheduled date. You can also choose to use UTC (default) or the endpoint local time to schedule the survey. Set a Start Time and End Time.
4. Choose endpoints to target with the survey. You can select computer groups to receive the survey. The user that creates the survey must have management rights to this computer group. To assign computer groups to a user, see [Tanium Platform User Guide: Manage computer group assignments for a user](#).
5. Choose user options for the survey, including whether they can postpone or decline the survey. You can also enable anonymous responses to the survey, so no user information is recorded from the responses.
6. Click **Run Survey**. If you want to end a survey while it is running, click **End Current Run**.

View existing survey status

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

Survey status icons

Status	Description
	The survey is in draft mode. Finish editing and schedule the survey run.
	The survey is currently running and collecting feedback from targeted endpoints.
	The survey is scheduled to run at a future date and time.
	The survey is done. You can run the survey again by editing the schedule.
	The survey contains an error.

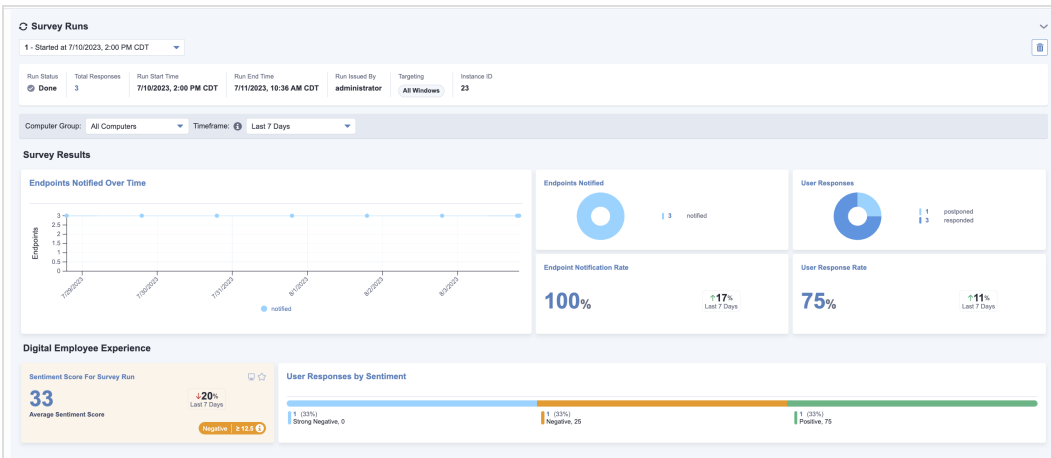
End user survey experience

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

- Take the survey.
- Postpone the survey, if the **Allow user to postpone survey** setting is enabled. The end user gets notified about the survey again at the scheduled interval.
- Decline the survey, if the **Allow user to decline survey** setting is enabled. The user is not notified about the survey again.
- Close the window, shut down the endpoint, or take no action. In any of these scenarios during private preview, the notification expires after 5 minutes and is not shown again. The user must view the survey in the End-User Self Service Interface.
- View the survey in the End-User Self Service Interface. The survey is listed in this interface, even if the user declined or postponed the survey.

View survey results

1. From the Engage home page or the **Surveys** page, click the name of the survey that you want to view.
2. If you want to change the results to a previous run, select a run from **Survey Runs**.
3. The **Survey Results** section shows a summary of the endpoints that received the survey and the users that responded to the survey.



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

View survey responses for a single endpoint

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

1. Open the Endpoint Details page for the endpoint that requires survey details. See [Tanium Reporting User Guide: View endpoint details](#).
2. Select the **Engage** tab.
3. In the **Survey Responses** section, view survey results, responses, performance score, sentiment score, and so on.

Run survey again

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

1. From the Engage menu, go to **Surveys**. Click the name of the survey that you want to run again. The survey must be in **Done** status.
2. Click **Run Survey Again**.

3. Edit the schedule. You can schedule a survey to run one time, or ongoing. You can also schedule a survey to run immediately or on a scheduled date. Depending on the options you choose, set a Start Date (survey starts at 12:00 AM Coordinated Universal Time (UTC)) and End Date (survey ends at 11:59 PM UTC).
4. Choose endpoints to target with the survey. You can select computer groups to receive the survey. For more information about configuring computer groups for Engage, see [Organize computer groups on page 19](#).
5. Choose user options for the survey, including whether they can postpone or decline the survey.
6. Click **Run Survey**. If you want to end a survey while it is running, click **End Current Run**.

Create question templates

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

1. From the Engage menu, go to **Survey Question Templates** page.
2. Click **Create Question**.
3. Add the question details, text, choices and a remediation for one of the answers. The remediation can provide a URL to open when the associated response is selected. Click **Submit**.
4. You can add the question to a survey when you add questions. During the survey creation process, click **Add Survey Questions > Choose Existing**.



IMPORTANT

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

Understanding employee sentiment

To understand employee sentiment, analyze the digital employee experience (DEX) data, which is a combination of the sentiment and performance scores.

Overall employee sentiment score

Employee sentiment is collected from sentiment questions in surveys.

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

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

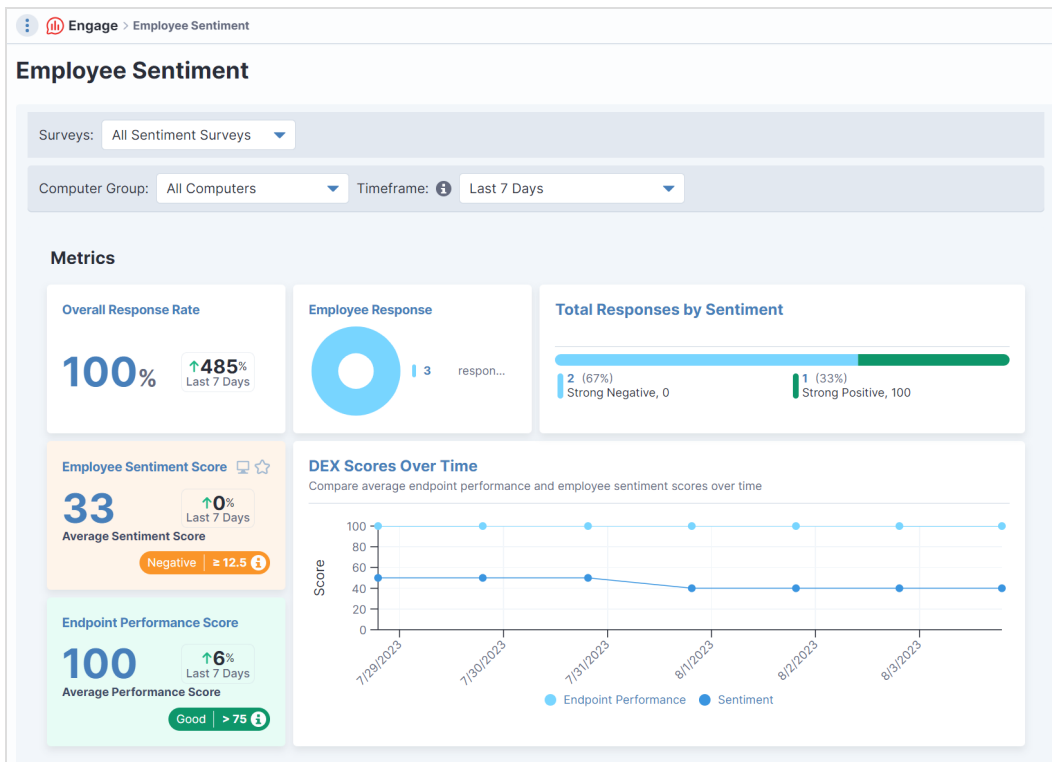
To start getting employee sentiment information, create surveys that include sentiment questions. See [Creating surveys on page 22](#).

Scope performance and sentiment scores

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

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

Review metric summary



Overall Response Rate

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

Employee Response

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

Total Responses by Sentiment

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

Employee Sentiment Score

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

Endpoint Performance Score

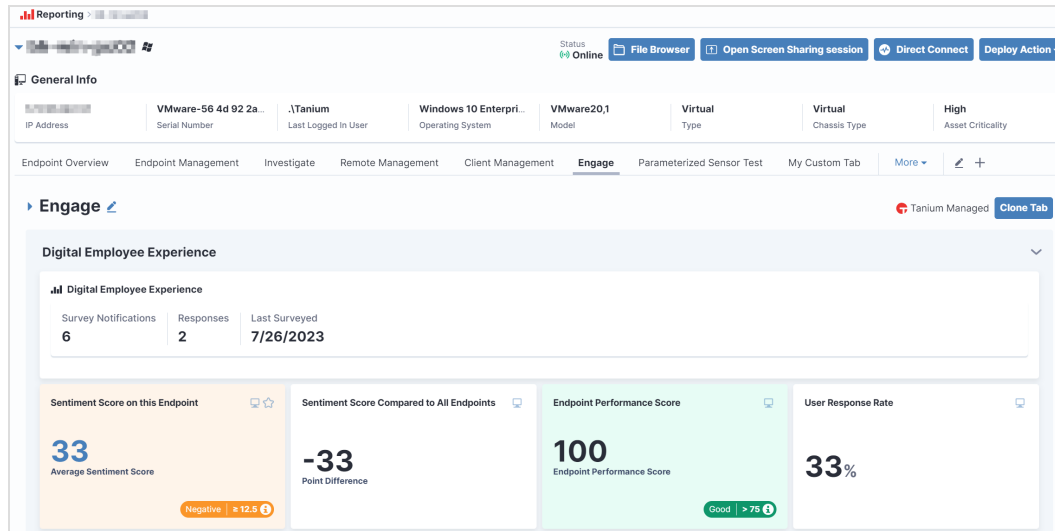
The average performance score shows the overall health of all endpoints that are scoped in the selection. For more information about how performance scores get calculated, see [Tanium Performance Overview: Performance scores](#).

DEX Scores Over Time

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

View digital employee experience (DEX) on a single endpoint

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



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

Creating remediation tasks

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

Default remediation tasks

The following remediation tasks are included with Engage.

Restart Endpoint

Restarts the target device.

Clear Microsoft Teams Cache

Clears cache to resolve problems with Microsoft Teams.

Clear DNS Cache

Clears DNS cache to help resolve network issues.

Enable / Disable Fast Start

Enables or disables the Windows OS Fast Start feature.

Restart <application>

Restarts the Cisco Webex, Google Chrome, Microsoft Edge, Microsoft Outlook, Microsoft Teams, Mozilla Firefox, Slack, or Zoom application.

User Disk Cleanup

Performs light (Recycle bin empty) clean.

Create remediation package

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

Tanium packages

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



IMPORTANT

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

Custom package

To create a custom package that runs in the user space on the endpoint, see [Sample: Create remediation package that runs in user space on page 31](#).

For more information about creating and managing packages, see [Tanium Console User Guide: Managing packages](#).

Create remediation task

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

Sample: Create remediation package that runs in user space

Use this sample to create a task that runs in the user space on an endpoint. This script uses the `TaniumRunasuser.exe` utility that ships with the Engage tools.

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

[OpenNotePadAsUser.ps1](#)

[OpenNotePadAsUser.ps1](#)

```
1 param (
2     # The SID of the user
3     [Parameter(Position = 0, Mandatory = $true)]
4     [string]$UserSID
5 )
6
7 function Get-SessionFromSid( [string] $UserSID) {
8     # Assume that the user has explorer.exe running
9     foreach ( $process in (Get-CimInstance Win32_Process -filter "name =
'explorer.exe'")) {
10         $owners = (Invoke-CimMethod -InputObject $process -MethodName GetOwnerSid)
11         foreach ( $owner in (Where-Object -InputObject $owners -Property ReturnValue -
EQ 0)) {
```

```

12         if ($UserSID -eq $owner.SID) {
13             return $process.SessionId
14         }
15     }
16 }
17 }
18
19 # you should check that this is not $null and exit gracefully
20 $sessionId = Get-SessionFromSid $UserSID
21
22 # Take note of the extra quotes around the inner command
23 $command = "cmd.exe /d /c start ""C:\Windows\notepad.exe""
24
25 # Note: /sessionid=<value> is one group
26 #       /cmd is one group, and has more quotes around $command
27 #       /userenv ensures that we will load the user's environment variables
28 $arguments = ("/noconsole", "/wrap", "/userenv", "/sessionid=$sessionId", "/cmd
"$command")
29
30
31 $fileName = "$Env:TANIUM_CLIENT_ROOT\Tools\Engage\tasks\taniumRunAsUser.exe"
32 Start-Process -FilePath $fileName -ArgumentList $arguments

```



IMPORTANT

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

- The `TaniumRunAsUser.exe` file should be run from the default Tanium Client path, at: `<Tanium Client>\Tools\Engage\tasks\taniumRunAsUser.exe`. Use the path exactly as it is provided in the `OpenNotePadAsUser.ps1` code sample.
- Any commands that run from within your package file should run from explicitly specified paths that are not writable by non-admin users. For example, the following command includes a path that is not writable: `"<Tanium Client>\Tools\Engage\tasks\taniumRunAsUser.exe" /noconsole /wrap /userenv /sessionid= /cmd "cmd.exe /d /c start "non\user\writable\path\TARGET_PROCESS"`



- If the `TaniumRunAsUser.exe` command is run with the `/user:env` switch, environment variables that are referenced from within the `TARGET_PROCESS` resolve to the target user's environment variables. Avoid executing scripts or executable files from within the `TARGET_PROCESS` using an unreliable path. A path that references user environment variables can lead to execution of unintended files.
- The self-authored package file code should validate package parameters before appending them directly to other commands.

2. Create the package in the Tanium console. From the main menu, go to **Administration > Packages > New Package**.
3. Enter the package details.

The screenshot shows the configuration interface for a new package in the Tanium console. The 'Details' section includes fields for Package Name, Display Name, and Content Set. The Command field contains the command: `cmd.exe /d /c powershell.exe -ExecutionPolicy Bypass -WindowStyle Hidden -NonInteractive -NoProfile -File OpenNotepadAsUser.ps1 $1`. The Command Timeout is set to 1 minute and the Download Timeout is 10 minutes. The Files section shows the file 'OpenNotepadAsUser.ps1' uploaded. The Parameters section shows a parameter input field with the value '\$1 - User SID' and a preview field with the value 'PARAM_USER_SID'.

- Command: `cmd.exe /d /c powershell.exe -ExecutionPolicy Bypass -WindowStyle Hidden -NonInteractive -NoProfile -File OpenNotepadAsUser.ps1 $1`
 - Verify that **Launch this package command in a process group** is not selected.
 - Click **Add File** and upload the `OpenNotepadAsUser.ps1` file.
 - Click **Add Parameter > Text Input**. For the Label, enter `User_SID`. In the preview, enter `PARAM_USER_SID` for the default parameter value. Save your changes.
4. Choose this package when you create your remediation task. See [Create remediation task on page 31](#).


Troubleshooting Engage

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

Collect logs

Collect troubleshooting package for Engage

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

1. From the Engage **Home** page, click Help , then the **Troubleshooting** tab.
2. Click **Download Support Bundle**.
A `tanium-Engage-support.[number].zip` file downloads to the local download directory.
3. Contact Tanium Support to determine the best option to send the ZIP file. For more information, see [Contact Tanium Support on page 34](#).

Tanium Engage maintains logging information in the `Engage.log` file in the `\Program Files\Tanium\Tanium Module Server\services\Engage` directory.

Collect troubleshooting information from endpoints

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

1. From the Main menu, click **Shared Services > Client Management**.
2. From the Client Management menu, click **Client Health**.
3. In the **Direct Connect** search box, enter all or part of an IP address or a computer name.
Matching results are displayed after the search completes.
4. From the search results, click the computer name to connect to the endpoint.
5. Click the **Gather** tab. In the **Domain** section, select the category or Tanium Solution for which you want to gather troubleshooting information.
6. Click **Gather from Endpoint**.
The selected logs and artifacts are gathered from the endpoint. The package appears in the **Must Gathers** section, and the name of the package corresponds with its time stamp.
7. When **Finished** appears in the **Run State** column, select the package and click **Download** to download a ZIP file that contains the troubleshooting information.

Contact Tanium Support

To contact Tanium Support for help, sign in to <https://support.tanium.com>.