

Actions to set tags - tutorial

Summary

A quick tutorial on adding properties and values for use when setting the coverage for questions. Tachyon enables Coverage tag properties to be created and set on Tachyon client devices, which can then be used when setting the coverage for a question. The basic workflow is:

1. A Tachyon [Custom Properties Administrator](#) defines the name of a Coverage tag and one or more associated values. See [Adding properties - tutorial](#) for more details on this step.
2. Actioners with permissions to the **Tags instruction set** run actions that use the defined properties and values and assign them to particular Tachyon client devices.
3. Questioners can then use the **Tags** parameter, when defining the coverage for a question, to constrain the coverage to particular properties and values thereby targeting particular Tachyon client devices. See [Using tags to set the coverage for a question - tutorial](#) for more details on this step.

This page provides a quick tutorial on how to perform step 2.

Setting tags

The example

On the [Adding properties - tutorial](#) page we set up a scenario with three departments whose devices we want to manage using Tachyon. The three departments are **Finance**, **IT Support** and **Sales**. We want to map these departments onto the devices in our example by setting tags. The only thing that links the devices is the departments they belong to and this is known according to the FQDN of the devices. The best way to handle the setting of the tags is to use a question where the coverage is set to a list of FQDN for a particular department and follow that with an action that sets the tags for that department.

The following table shows the department mapping we want to model using tags:

Department	Device FQDN
Finance	ACME-WIN1001.acme.local
	ACME-WIN702.acme.local
IT Support	ACME-WIN701.acme.local
	ACME-WIN802.acme.local
	ACME-EXC01.acme.local
	ACME-SQL01.acme.local
	acme-rhel01.acme.local
Sales	ACME-WIN1002.acme.local
	ACME-WIN801.acme.local

Our example environment, as shown in the picture opposite, is obviously very small but the advantages will be seen for much larger examples, where each department's set of devices may run into the hundreds or even thousands.

Choosing the right question

To run an action you first need to ask a question, but which question should you ask?

Fundamentally, questions return a list of device names, with associated information. This list of device names can then be used to target the devices on which to run actions.

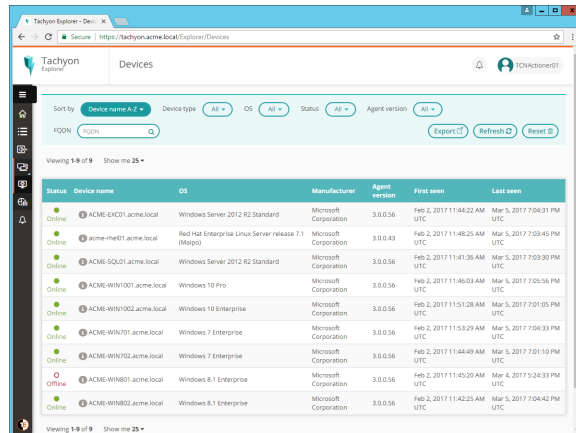
There are many different circumstances, questions and actions that may be used, but generally the question selected should try to meet the following guidelines:

- The question should identify a superset or the set of devices that you want to run the action on. Question responses can always be refined by setting coverage, response filters or view filters.
- Avoid questions that retrieve information that isn't relevant to the action. This is mainly to avoid unnecessary network traffic.

In our example we will select the question **How many of each operating system version are installed?**

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We choose this question because:

- We want a question that would get a response from all devices and we'll apply a coverage that selects the devices we want using their FQDN
- The question does not return much unnecessary information.

Setting coverage tags

For our example the user **TCNActioner01**, with the Tachyon global actioner role, is going to set the tags for the finance department devices. The animation opposite illustrates the following steps:

1. **TCNActioner01** selects the **How many of each operating system version are installed?** question
2. After the question has been selected they then edit the question parameters, expand the **Coverage** heading and enter the FQDN for the devices in the finance department into the field under the **Device List (FQDN)** heading. To save the list to the question they click on **Set**.
3. Asking the question, by clicking on the **Ask the question** button, gets two responses from the two devices named in the FQDN list
4. Having got back the responses they were looking for they now run the follow-up action that will set the correct tags for those devices. The action is selected from the **Actions** tab.
5. They type **set coverage** into the edit field and then select the **Set coverage tag <tagname> to <tagvalue>** action
6. The parameters for the action are populated from the coverage properties and values that have previously been set by an extended properties administrator. They set the **<tagname>** to **Department** and the **<tagvalue>** to **Finance**
7. After setting the values they click the **Perform this action** button
8. The action is subject to confirmation, authentication and approval. They first confirm their credentials by entering their password
9. When challenged to provide an authentication code **TCNActioner01** then checks their email, copies the code and pastes it into the challenge dialog
10. Now **TCNApprover01**, a global approver, will be sent an email, using the link at the bottom of the email they navigate to the Tachyon Explorer and approve the action
11. The action now runs and the responses appear to **TCNActioner01**. Here you can see the two devices that were targeted using their FQDN have responded and the tag with the property name **Department** and a value of **Finance** has been set.

Having set the tag for the finance devices the exact same approach can be used to set the tags for the other two department's devices. Once all the tags have been set, questions can be asked with scopes that target the tags, as described in [Using tags to set the coverage for a question - tutorial](#).