# **ThreatQuotient**



# **ThreatQ TDR Orchestrator User Guide**

Version 2.4.0

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### **ThreatQuotient**

20130 Lakeview Center Plaza Suite 400 Ashburn, VA 20147

### **Support**

Email: support@threatq.com

Web: support.threatq.com

Phone: 703.574.9893



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# **Warning and Disclaimer**

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# **About ThreatQ Orchestrator**



### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestration Workflow

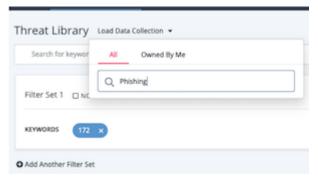
ThreatQ TDR Orchestrator includes enhanced automation, analysis and reporting capabilities that accelerate threat detection and response across disparate systems.

Using Configuration-Driven Workflows (CDWs), applying Smart Collections, and Custom Scoring, ThreatQ prioritizes the threats that are important for remediation. That could be simple automation to quarantine the device or more complicated workflows to remediate the threat by shutting down a service, removing malware, restoring the system, submitting an alert, creating a ticket or initiating an investigation.

ThreatQ TDR Orchestrator can involve any number of tools and should provide cross team visibility for a more complete XDR security solution.

# **Data-Driven Triggers**

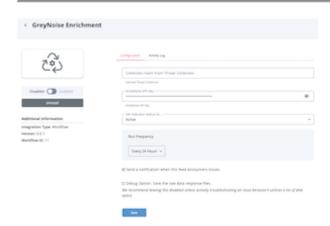
Define what type of data to enrich using the ThreatQ Threat Library. Save your Threat Library queries as Data Collections to be used as Data-Driven Triggers in the orchestration workflow.



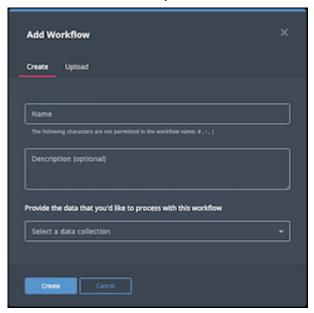
# **Configuration-Driven Workflows (CDWs)**

CDWs, also known as Data-Driven Playbooks, take your identified triggers, in the form of Data Collections, and enrich your selected threat intelligence data using third-party providers such as Shodan, to curate further detailed threat information.





TQO gives you the option to import advanced workflows from predefined YAML files or create your own workflows in the TQO workflow builder.



# **Capture Enriched Data**

The enriched information captured by the CDW is then ingested back into the ThreatQ platform for further analysis and refinement.





# Requirements



### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

### Confirm that you have the following:

• ThreatQ version 5.4.0 or greater

 A ThreatQ Orchestrator license. This can be confirmed by clicking on the **Settings** gear icon and selecting **About**.



- A saved data collection
- An installed TQO action
- A login with an Administrator or Maintenance user role or a custom user role that includes Edit Orchestration Workflows permissions.



# **Components**

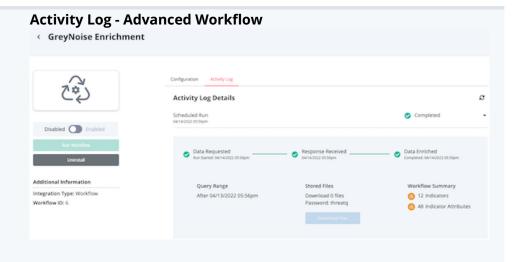
The following table contains key components, terms, and definitions regarding ThreatQ TDR Orchestrator (TQO) .

# COMPONENT/ **DEFINITION TERM** Action Actions are YAML snippets you can use to enrich the data specified by your workflow's data collection. See the About Actions topic for more information about actions. **Activity Log** TQO provides activity logs for workflows uploaded into TQO as well as those created in TQO. A workflow's activity log provides you with a summary of each manual or scheduled run of the workflow. This includes: · Date/time of the run • Run status at completion · Data requested Response received Data enriched **Activity Log - Workflow Built in TQO** < Shodan test ie View Activity Log **Activity Log Details**



### COMPONENT/ TERM

### **DEFINITION**



Configuration
Driven Workflow
(CDW)/Workflow

Configuration Driven Workflows (CDWs), also known as Data-Driven Playbooks, take your identified triggers, in the form of Data Collections, and enrich your selected threat intelligence data using third-party providers such as Rapid7, to curate further detailed threat information.

There are two types of workflows:

- **Standard Workflows** workflows built within the Workflow Builder using installed Actions. These workflows can also be run from the Threat Library and an object's details page.
- Advanced Workflows preconfigured workflows, developed by ThreatQ Professional Services, that have been written to include all required actions and the data enrichment processes. Advanced Workflows are designed to be installed (required actions and workflow) via a single YAML file in the ThreatQ UI installer.

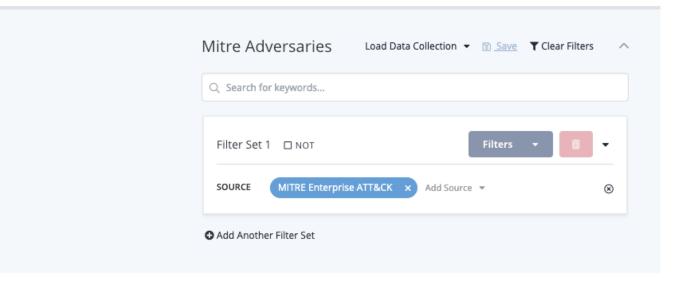
### **Data Collection**

A data collection is a saved ThreatQ Threat Library query that identifies the information to be enriched by a workflow.



### COMPONENT/ TERM

### **DEFINITION**



### **Nodes**

A node is a basic unit of a data structure within TQO, such as a data collection, workflow, or action, displayed in the Node View. You can click on a node to view and/or update its configuration details.



### **Node View**

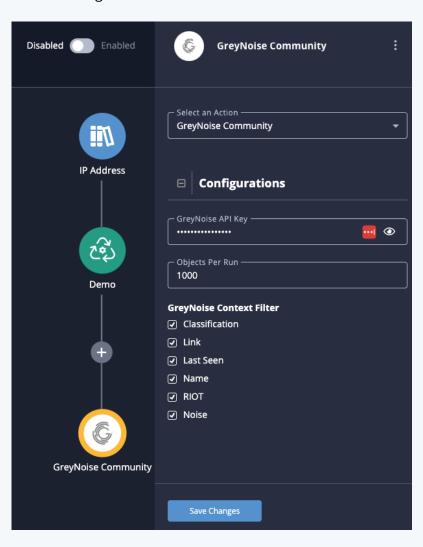
A workflow's Node View provides you with a visual representation of its basic components, the data collection, the workflow, and its action(s). You can access the Node View by clicking a workflow created in TQO in the Orchestrator page. These workflows have a type listed as Workflow Builder.



### COMPONENT/ TERM

### **DEFINITION**

From the Node View you can click the various workflow nodes, such as data collection, workflow, or action nodes, and view or update each node's settings.





# **About the Orchestrator Page**

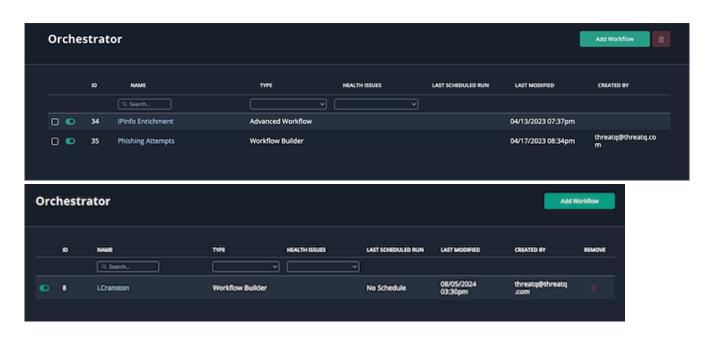


### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

The Orchestrator page is the hub of TQO. It provides an overview of your existing workflows, allows you to manage these workflows, and create or import new ones.

Your workflows, both built within TQO and installed Advanced workflows, are displayed in an information table on the landing page.



# ID The unique ID associated with the workflow. Name The name of the workflow. You can use the search provided below the header to filter your workflow list by the workflow name. Type The type of workflow. You can filter the workflow list use the column's dropdown list. Options include: • Workflow Builder • Advanced Workflow

**DESCRIPTION** 

**COLUMN** 

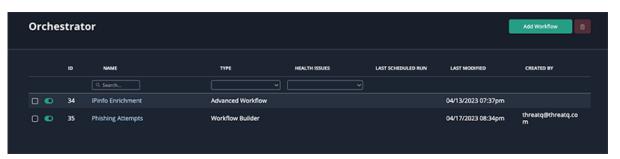


COLUMN	DESCRIPTION
Health Issues	This column displays the current health of a workflow. You can filter the workflow list using the dropdown provided. Filter options include:  • Healthy • Unhealthy
Last Scheduled Run	The date stamp when the scheduled workflow was last run.
Last Modified	The date stamp of when the workflow was last modified.
Created By	The user that created the workflow. This column will only be populated for workflows built within the workflow builder.

# **Accessing the Orchestrator Page**

1. Click the **Orchestrator** icon in the top navigation bar.

The Orchestrator page will load.



2. Click the **Add Workflow** button to begin your building workflows in workflow builder or installing Advanced Workflows.



# **Actions**

### **About Actions**



### THREATQ REQUIRED PERMISSIONS

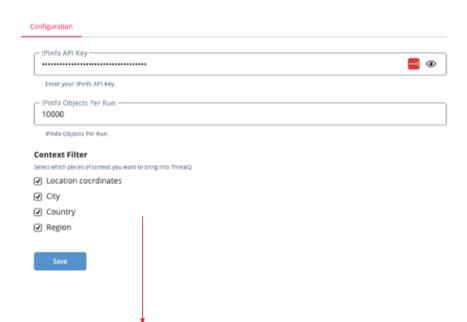
**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

Actions are YAML snippets you can use to enrich the data specified by your workflow's data collection. Actions are not designed to run by themselves but instead be inserted into your enrichment workflows.



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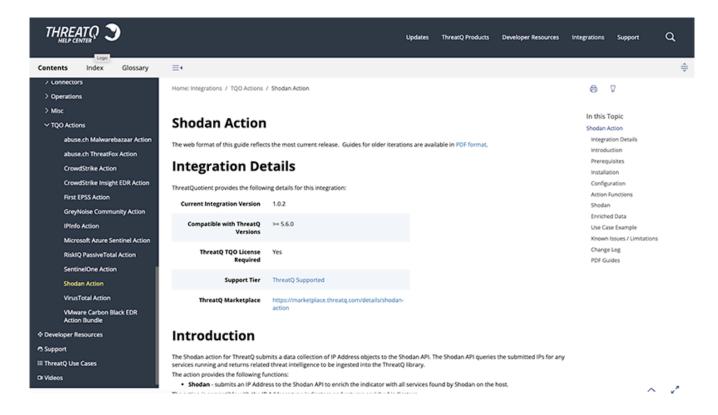






ThreatQuotient highly recommends reviewing an action's user guide before downloading and installing the action. See the Integrations section for those guides - both in web and PDF format.





### **Quick Notes**

- Actions can be download from the ThreatQ Marketplace https://marketplace.threatg.com.
- Actions with the term "bundle" in the name contain multiple actions.
- Actions can be installed by uploading the zip file itself to the ThreatQ platform.



Refer to the action's user guide for details. Some action zip files contain custom objects that are required to run the action. Those custom objects cannot be installed using the ThreatQ UI installer.

- Actions are automatically enabled upon installation and cannot be disabled.
- The configuration settings set for an action will be applied when inserting it into a workflow.
   You can change an action's configuration settings for a specific workflow or the default configuration settings.



Updating the default configurations for an action will not update any instances of the action that has already been deployed in a workflow.



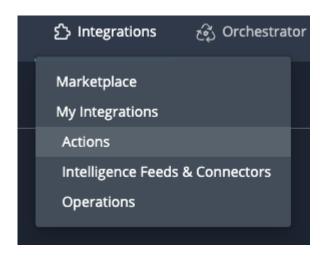
# **Installing an Action**

9

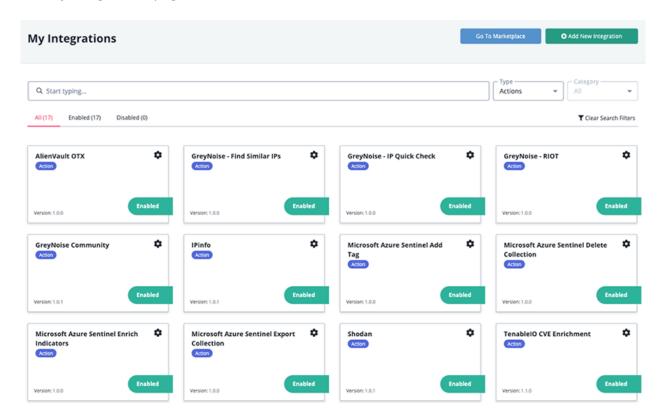
### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows AND Run Manual Workflows

- 1. Download the action zip file from the ThreatQ Marketplace.
- 2. Click on the Integrations navigation heading and select **Actions**.



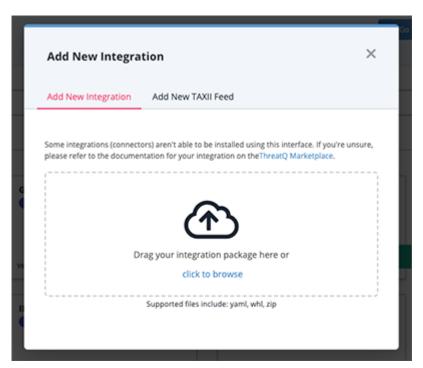
The My Integrations page will load with the list filtered down to actions.



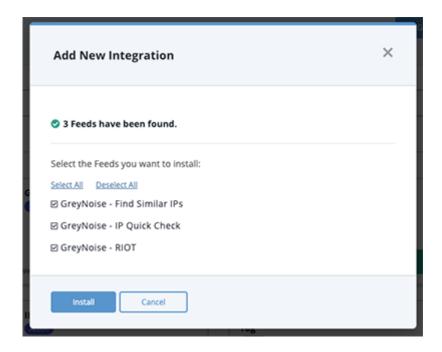


3. Click on the **Add New Integration**.

The Add New Integration dialog box will open.



- 4. Upload the action zip file using one of the following methods:
  - Drag and drop the file into the dialog box
  - Select **Click to Browse** to locate the action zip file on your local machine
- 5. Select which actions to install, if prompted, and click on **Install**.







ThreatQ will inform you if the action already exists on the platform and will require user confirmation before proceeding. ThreatQ will also inform you if the new version of the action contains changes to the user configuration. The new user configurations will overwrite the existing ones for the action and will require user confirmation before proceeding.

The action(s) will now be installed on your instance. While actions are automatically enabled by default, you will still need to configure the action's default settings.



# **Configuring an Action**



### THREATQ REQUIRED PERMISSIONS

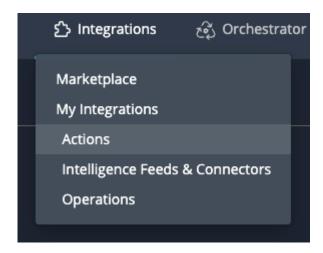
**Default ThreatQ Role:** Administrative or Maintenance Custom - Action Permissions Role: Orchestration - Edit Orchestrations Workflows AND Run Manual Workflows

You can configure an action's default settings from its details page under the My Integrations page. This allows you to set common parameters, such as API Keys, that will be used within any workflow you insert the action into.



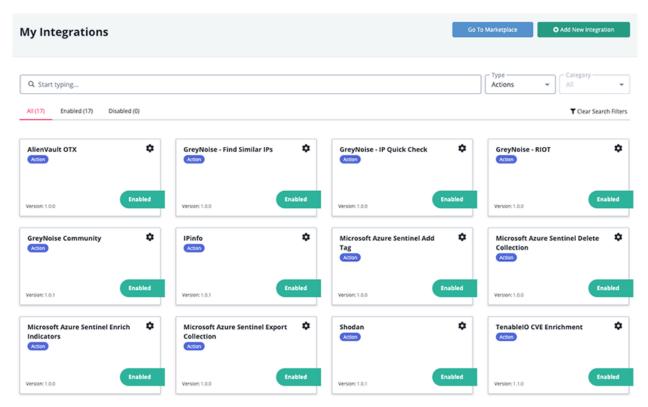
 $oldsymbol{\Lambda}$  Updating the configurations on this page will not update any instances of this action that have already been deployed to a workflow. In that scenario, you must update the action's configurations within the workflow itself.

1. Click on the Integrations navigation heading and select **Actions**.



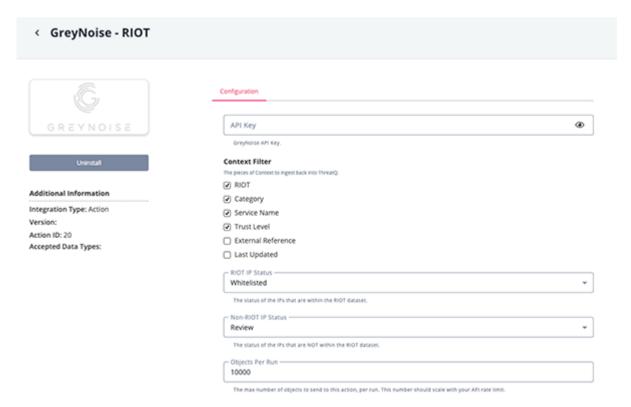
The My Integrations page will load with the list filtered down to actions.





2. Click the action to configure to open its details page.

The Action Details page will load.



3. Enter your configuration settings and click on **Save**.





Specific configurations will differ based on the action used. See the action's individual user guide for more information.



# **Deleting an Action**

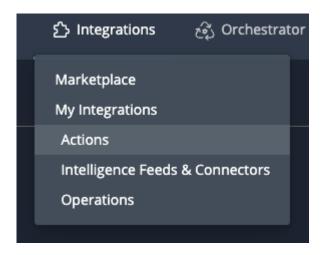


### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows AND Run Manual Workflows

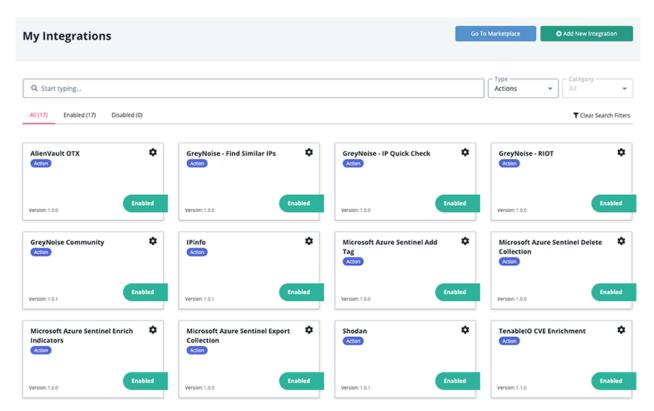
You can delete an action from its details page if it is not currently associated with a workflow. Deleting an action will not delete the data that has already been ingested by the ThreatQ platform.

1. Click on the Integrations navigation heading and select **Actions**.



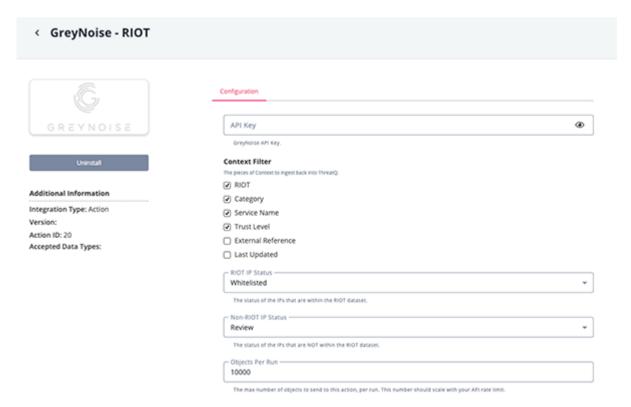
The My Integrations page will load with the list filtered down to actions.





2. Click the action to configure to open its details page.

The Action Details page will load.



3. Click on the **Uninstall** button located below the action's logo.





If the Uninstall button is grey out, the action is currently being used by a workflow. Locate the workflow using this action and remove the action.

4. Click on **Uninstall Action**, when prompted, to remove the action from your instance.



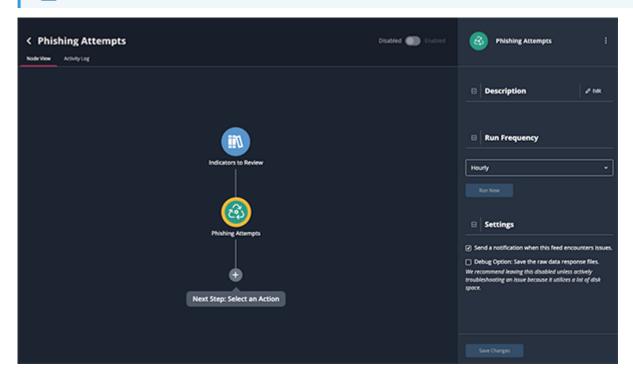
# Workflows

### **About Workflows**

Workflows take your identified triggers, in the form of Data Collections, and enrich your selected threat intelligence data using Actions, third-party providers such as Rapid7, to curate further detailed threat information.



Workflows do not override default statuses assigned to system objects.



Workflows can be triggered by the following:

- Workflow's Run Schedule.
- Manually Running the workflow from the builder page via the **Run Now** button.
- Performing a Manually Triggered Workflow run from the Threat Library or object details page.

The TQO workflow builder provides you with a visual representation of how your Threat Library data collection and action are utilized. The interface allows you to configure how an action is run, including what enriched context the action will ingest, the frequency of runs, and summaries of each run.

The following is required to build a workflow:

- · A TQO License.
- A ThreatQ Data Collection.
- A TQO Action installed on your ThreatQ instance. TQO Actions can be downloaded from the ThreatQ Marketplace.



# **About Manually Triggered Workflows**



### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative, Maintenance, or Primary Contributor **Custom - Action Permissions Role:** Orchestration - Run Manual Workflows

Maintenance Account and Administrative Access users can apply a workflow created in TQO to a group of action-compatible objects from the Threat Library results page or to a single object from the object details page.



Running a workflow from the Threat Library or object details page will ignore any data collection set in the workflow's configuration for the object(s) you have selected.

### **Important Notes:**

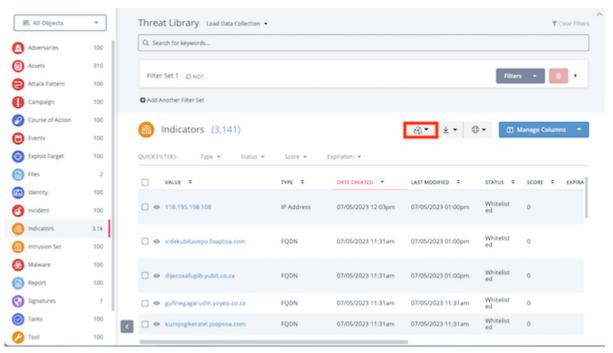
- Only workflows created in TQO can be manually triggered from the Threat Library.
- Only Maintenance Account and Administrative Access users can access the Start Workflow button.
- The Start Workflow button is only displayed for indicator results lists and indicator object details pages.
- If you manually trigger a workflow that includes a data collection from the Threat Library, the workflow actions are applied only to the selected Threat Library object(s), not the workflow's configured data collection.

### Running a Manually Triggered Workflow - Threat Library Results Page

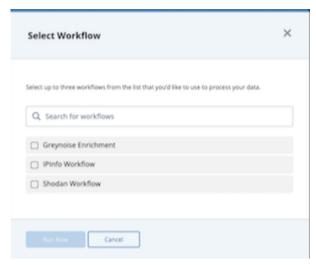
- 1. Navigate to the Threat Library page.
- 2. Select the system objects to which you want to apply the workflows by searching or filtering the Threat Library or by selecting a Data Collection. You can further customize by checking the checkbox next to each object you want to include.



3. Click the 🍪 (start workflow) button.



- 4. Select the object type you want to work with.
- 5. From the Select Workflow window locate and check the box next to each workflow you want to apply to your list of system objects. You can select up to three workflows.



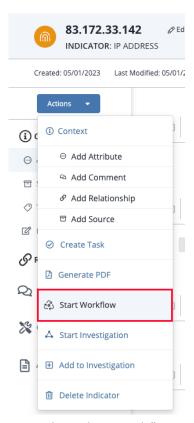
6. Click the **Run Now** button.
You can access each workflow's Activity Log to view the results of the manual run.

### Running a Manually Triggered Workflow - Object Details Page

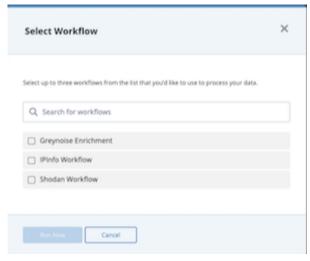
1. Navigate to the system object's object details page.



2. Click the **Actions** button and select the **Start Workflow** option.



3. From the Select Workflow window locate and check the box next to each workflow you want to apply to the system object. You can select up to three workflows.



4. Click the **Run Now** button.

You can access each workflow's Activity Log to view the results of the manual run.



# **Building a Workflow**



### THREATQ REQUIRED PERMISSIONS

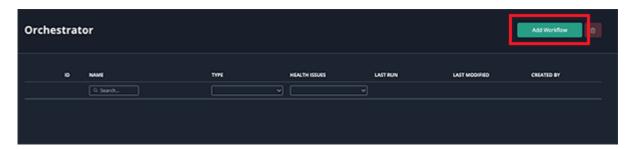
**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

The workflow builder allows you to create your own workflows using data collections and installed TQO Actions, which are available on the ThreatQ Marketplace.



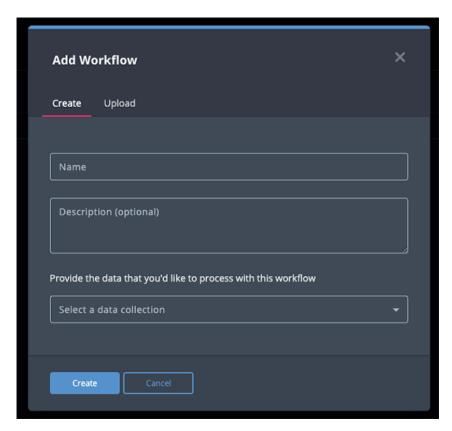
Manually Triggered Workflows do not require a set data collection as the data is selected from the Threat Library. In the event that a workflow with a set data collection is selected as the Manually Triggered Workflow, the object or Threat Library selection will be used instead of the set data collection.

- 1. Navigate to the ThreatQ Orchestrator page.
- 2. Click on the **Add Workflow** button.



The Add Workflow dialog window will open.





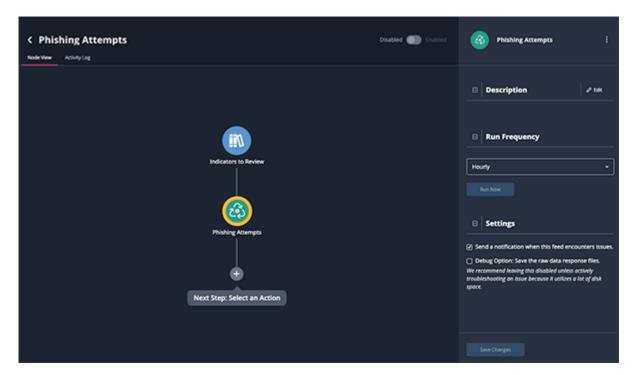
3. Complete the following fields:

# Name The name to give this workflow. Description Optional - A description of what this workflow does. Data Collection The data collection that will used in the workflow. A data collection is required if you intend to run the workflow by schedule. Workflows built to be used as Manually Triggered Workflows do not require a set data collection.

4. Click on **Create**.



The Workflow Builder will load.



5. Set how often the workflow will run using the dropdown provided under Run Frequency. You can select periodic or scheduled runs.

### **Periodic Run Options**

SELECTION	DESCRIPTION
Hourly	Run the workflow every hour.
Every 6 Hours	Run the workflow every six hours.
Every 24 Hours	Run the workflow every day.
Every 2 Days	Run the workflow every two days.
Every 14 Days	Run the workflow every two weeks.
Every 30 Days	Run the workflow every month.

SELECTION DESCRIPTION

**Schedule Run Options** 



Daily	Allows you to run the workflow at a specific time every day.
Weekly	Allows you to run the workflow at a specific time, on a specific day, every week.



You can also select **No Schedule**. This will result in the workflow only running when you click on the **Run Now** button or initiate a **Manually Trigger Workflow** run from the Threat Library or an object's details page.

6. Review the workflow settings under the Settings option. Options include:

### SETTING

### **DESCRIPTION**

### Send a Notification

Enabled by default. Workflow Health Notifications allow the ThreatQ application to send you, and other designated users, email and in-app notifications when a workflow encounters an issue. The in-app notifications appear in Notification Center for users with an administrator or maintenance account. These notifications include a link that redirects you to the Activity Log tab for the workflow. See the Workflow Notifications topic for more information.

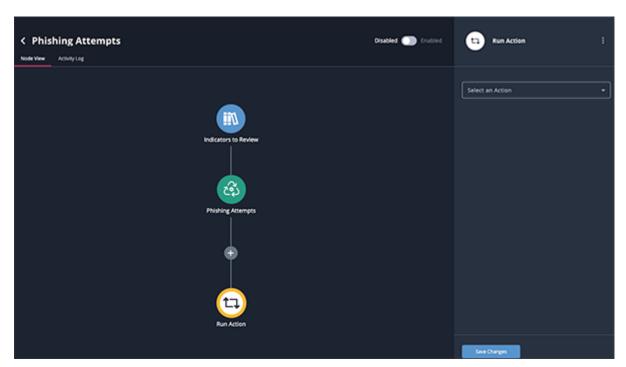
### Debug Options

Disabled by default. The Debug Option checkbox gives you the option to save raw data response files for troubleshooting purposes. Since this option uses a large amount of disk space, it defaults to unchecked. ThreatQuotient recommends temporarily enabling the option when you are troubleshooting a workflow issue.

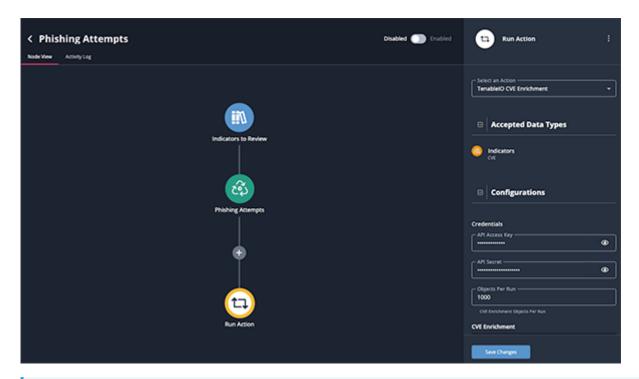
7. Click on the + icon, located beneath the workflow node, to select an action.



8. Select an installed action from the dropdown menu provided in the right pane.



9. The action node will appear in the builder view and the action's details will load in the right pane.



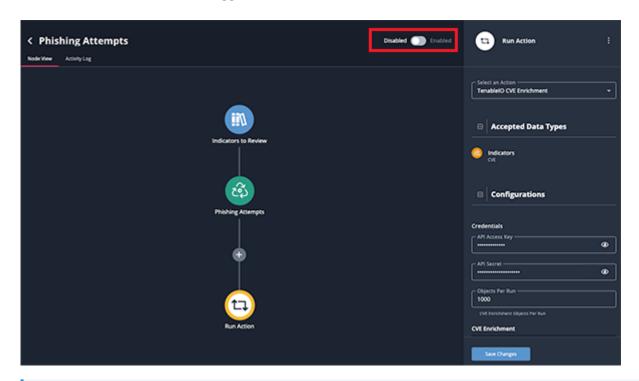


Actions will load with the default settings that have been saved in the action's details, such as API Keys, under the My Integrations page. This allows you to use an action in multiple workflows without having to enter credentials each time you add it. You can modify the action's configuration in the workflow itself in the right pane. Any



configuration changes to an action made in the workflow itself will only apply to the action's instance in that particular workflow and will not change the default settings. Additionally, any modifications to the action's default configuration from the My Integrations page will not affect actions already deployed in a workflow.

- 10. Review the configuration options for the action, make any changes if needed, and click on **Save Changes**.
- 11. Repeat steps 7-10 to add additional actions.
- 12. Click on the **Disable/Enable** toggle switch to enable the workflow.





Upon enabling the workflow, it will initiate a run and then follow your set schedule. The workflow will not automatically initiate a run if you have **No Schedule** set as the frequency.



# **Modifying a Workflow**



### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

You can update an existing workflow from the workflow builder page.



This steps covered in this section are for workflow built using the workflow builder. See the Configuring Advanced Workflows topic for steps on modifying Advanced Workflows.

### **Changing the Data Collection**

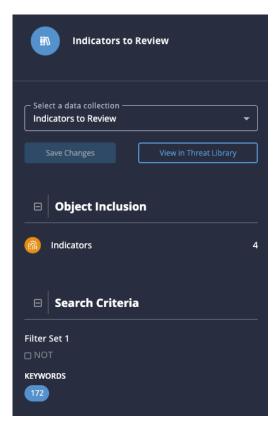
You can change the data collection used in the workflow.

1. Click on the data collection's node on the builder page.



The workflow's details will load in the right pane. You will see the current data collection selected and the objects included.





2. Use the dropdown provided to select a new data collection.



You can also click on the **View in Threat Library** option to open the data collection in the Threat Library to make changes to the data collection's filters.

3. Click on **Save Changes**.



The workflow will reload and the details pane will update with the new data collection.



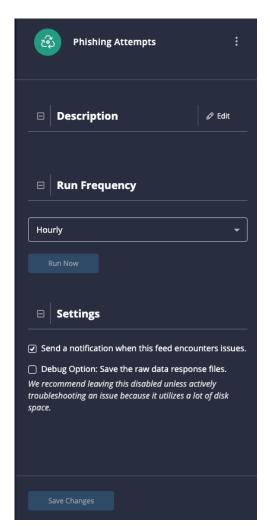
### **Updating a Workflow's Run Frequency**

1. Click workflow's green node in the workflow builder.



The workflow's details will load in the right pane. You will see the current run frequency selected along with other details regarding the workflow.





- 2. Select a new run frequency using the dropdown provided.
- 3. Click on Save Changes.

### **Enabling Debug Option**

You can enable the debug option to capture raw data response files for troubleshooting.



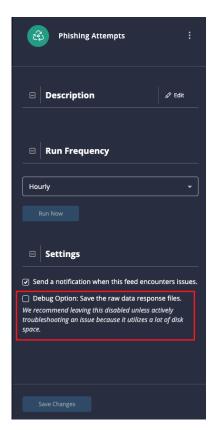
The Debug Option should only enabled temporarily to troubleshoot a workflow as it uses a large amount of disk space.

1. Click workflow's green node in the workflow builder.





The workflow's details will load in the right pane.

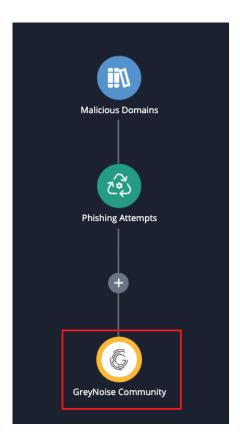


- 2. Check the **Debug Option** to enable it.
- 3. Click on **Save Changes**.



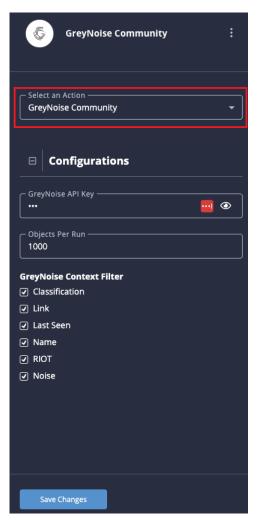
# **Changing an Action in a Workflow**

1. Click on the action's node in the workflow builder.





2. Use the dropdown provided to select a new action for the workflow.



3. Click on Save Changes.

### **Updating an Action's Configuration for a Specific Workflow**

When an action is inserted into a workflow, the default configuration for the action, set in the action's details page, are included. This can include API credentials as well as specific settings how what is done with the data. You can edit the configuration settings for an action in a specific workflow in the right pane of the workflow builder.

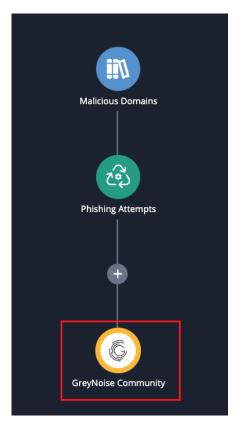


This will only effect the action's instance in that specific workflow and will not change the action's default configation setting or other workflows that use the action.

**Example:** The default context filter for an action is designed to capture Name, Link, and Classification by default. When you insert the action into a workflow, you can update the configuration settings for that specific workflow to only capture the Name and Link without change the default for the action itself.

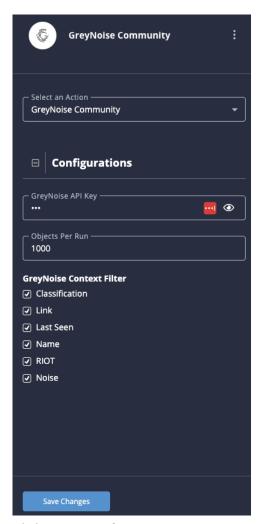


1. Click on the action's node in the workflow builder.



2. Make your required edits to the configuration options available under the **Configurations** heading.





3. Click on Save Changes.

# Updating an Action's Default Configuration from the Workflow Builder



#### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows AND Run Manual Workflows

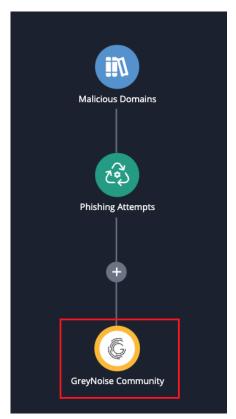
You can access and edit an action's default configuration settings from the workflow builder.



Updating the default configuration settings for an action will not update any instances of this action that have already been deployed to a workflow. This includes any workflow that you may be actively editing if you have already inserted the action.

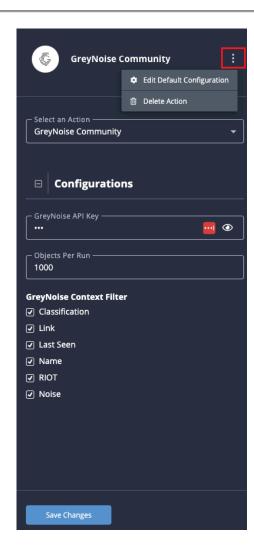


1. Click on the action's node in the workflow builder.

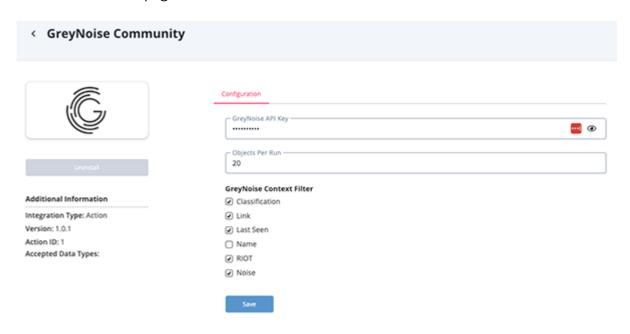


2. Click on the **vertical ellipsis** next to the action's name and select **Edit Default Configuration**.





The action's details page will load.



3. Make your required configuration settings and click **Save**.



# **Performing Manual Workflow Runs**

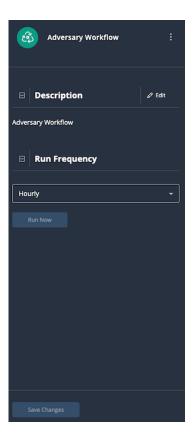


#### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

You can perform manual workflow runs if the action utilized by workflow allows it.

- 1. Open the workflow in the workflow builder.
- 2. Click on the **green workflow node** to load its details in the right panel.
- 3. Click on the Run Now button located under the Run Frequency heading.





# **Viewing the Activity Log**

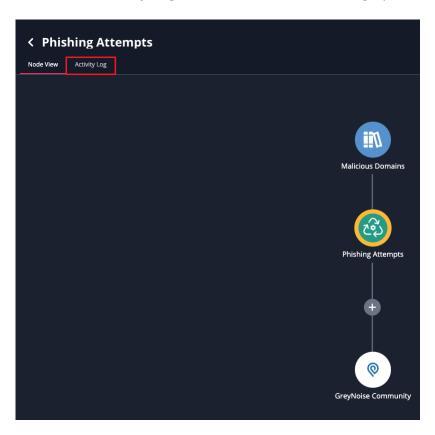


#### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

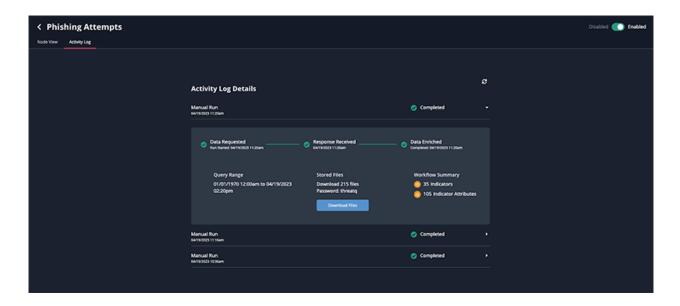
You can review the activity log for workflow in the workflow builder page.

- 1. Open the workflow within the builder.
- 2. Click on the **Activity Log** tab located above the node graph.



The Activity Log will load.





### **Activity Log Details**

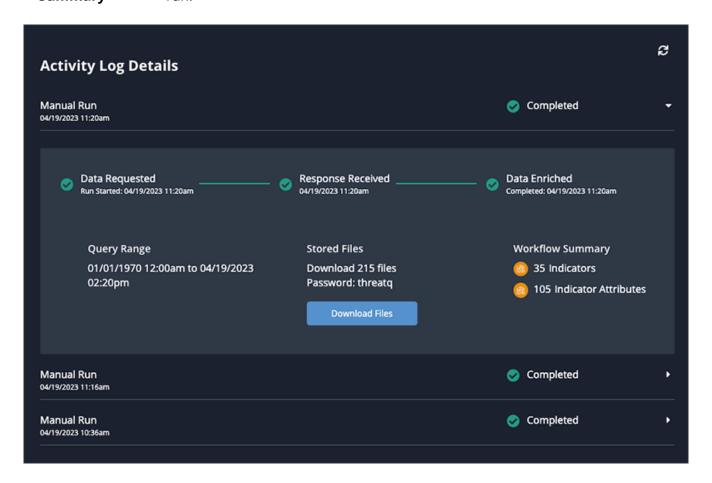
The Activity Log provides the following run information:

FIELD	DESCRIPTION
Type of Run	Whether the run was a scheduled or manual run.
Data Requested	The timestamp of when the data was requested.
Response Received	The timestamp of when a response from the provider was received.
Data Enriched	The timestamp of when the action enrichment was completed.
Query Range	The dataset range for the information.
Stored Files	Files downloaded during the run and the password to open the files. If the workflow encountered errors, you can click the <b>Download Files</b> button to download a zip file(s) containing the error log(s). When you open the zip file(s) you are prompted to enter the Password displayed above the Download Files button.



FIELD DESCRIPTION

**Workflow** A breakdown of the specific types of system objects were ingested during the run.





# **Deleting a Workflow**



#### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

There are two ways to delete a workflow: from the Workflow Builder page and from the Orchestrator landing page.



Deleting a workflow will not delete the system objects that have already been ingested into the ThreatQ platform.

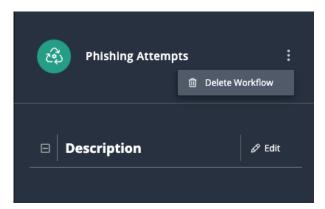
### **Deleting a Workflow from the Workflow Builder**

1. Click on green workflow node in the workflow builder page.





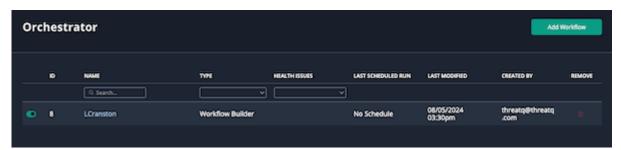
2. Click on the vertical ellipsis to the right of the workflow name and select **Delete Workflow**.



3. Click on the **Delete Workflow** button, when prompted, to confirm deletion.

### **Deleting a Workflow from the Orchestrator Landing Page**

1. For the workflow you want to delete, click the red trashcan icon in the Remove column.



- 2. Click the **Delete Workflow** button, when prompted, to confirm deletion.
- 1. Select the checkbox next to the workflow to delete and then click the red trashcan icon.
- 2. Click on the **Delete Workflow** button, when prompted, to confirm deletion.



# **Advanced Workflows**

### **About Advanced Workflows**



#### THREATQ REQUIRED PERMISSIONS

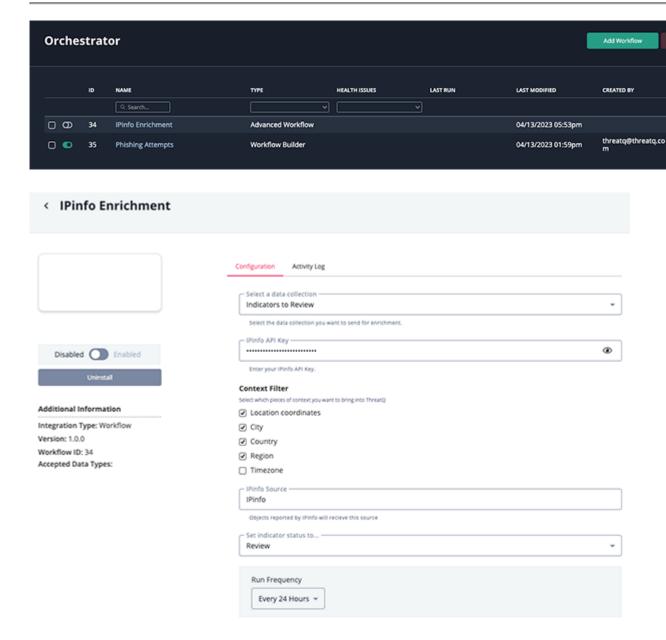
**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

Advanced Workflows are preconfigured workflows, developed by ThreatQ Professional Services, that have been written to include all required actions and the data enrichment processes. Advanced Workflows are designed to be installed (required actions and workflow) via a single YAML file in the ThreatQ UI installer. Once installed, you will only need to add your third-party credentials and select your default configuration settings.



Contact ThreatQuotient Customer Success to request an Advanced Workflow.





### **Important Notes**

The following is a list of important differences between workflows built in the Workflow Builder UI and Advanced Workflows:

- Advanced Workflows cannot be opened in the Workflow Builder. All configuration settings and workflow scheduling configurations are set from the workflow details page.
- All Advanced Workflow run details can be viewed on the Activity Log tab for the workflow details page.
- Advanced Workflow details can only be accessed from the Orchestrator page. You cannot view installed advanced workflows on the My Integrations page.
- Advanced Workflows cannot be used as Manually Triggered Workflows in the Threat Library nor an object's details page.



# **Installing an Advanced Workflow**



#### THREATQ REQUIRED PERMISSIONS

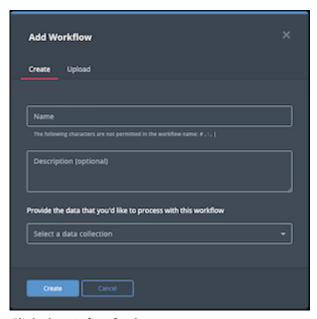
**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows



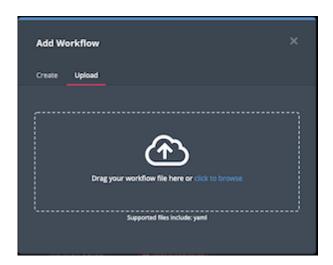
TQO only supports the uploading and use of workflow YAML files developed by ThreatQuotient. Contact ThreatQuotient Customer Success for more information.

- 1. Click the **Orchestrator** option in the main navigation.
- 2. Click the **Add Workflow** button.

  The Add Workflow window is displayed with the Create tab selected.

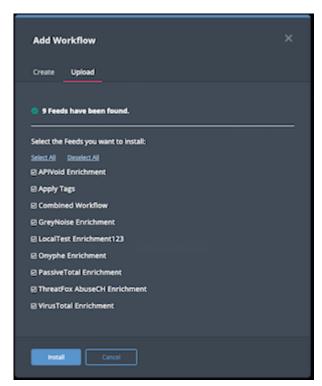


3. Click the **Upload** tab.





- 4. Upload the advanced workflow file using one of the following methods:
  - Drag and drop the workflow file into the dialog box
  - Select the **click to browse** link to locate the workflow file.
- 5. If the workflow file contains multiple feeds, you are prompted to select which feeds to install. Select the feeds to include and click **Install**.



6. When the install is complete, you must configure and enable the advanced workflow before you can run it.



# **Configuring an Advanced Workflow**



#### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

After you upload the YAML file for an advanced workflow, the workflow details page allows you to configure, enable, and run the workflow. In addition, the Activity Log tab in this page provides you with details for each workflow run.



The workflow details page is available only for advanced workflows. Use the workflow node view to configure and manage workflows created in TQO.

1. Click the **Orchestrator** option in the main navigation.

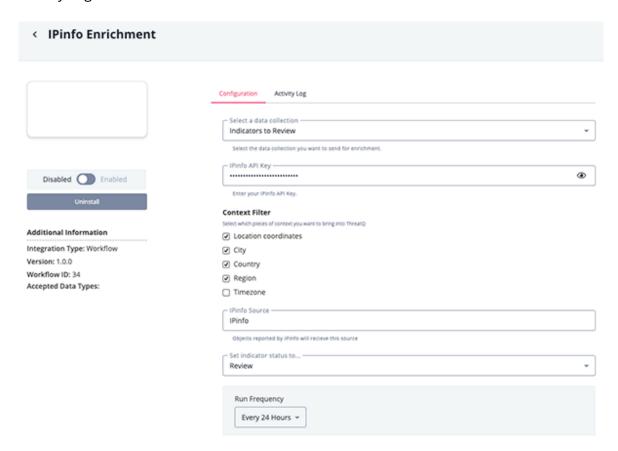


The Orchestrator page lists both workflows built with the workflow builder and installed workflows (Advanced Workflows). Advanced Workflows will be marked as such in the **Type** column.

- 2. Locate and click the advanced workflow to load its details page.
  - The workflow details page displays and lists the following:
    - Workflow details, such as the workflow version and workflow ID.
    - Configuration tab



· Activity Log tab



- 3. Workflow configuration options can vary. However, most advanced workflows require the following configuration parameters:
  - Data Collection Click the Select a data collection field to access a drop-down list of saved data collections. This list displays all data collections you have been granted permissions for by default. You can click the Owned by Me tab to display only the data collections for which you have owner permissions. Use one of the following methods to select a data collection from either tab:
    - Select the data collection from the dropdown list. You can narrow the list by entering all or part of the data collection name. As you type, the dropdown list displays matches for your entry.



Adding a Data Collection to a Workflow will give all admin users read-only access to it.

- 4. Select a default status that the workflow will assign to system objects that are ingested by the workflow.
- 5. Select a **Run Frequency**. Options include:

#### **Periodic**

SELECTION DESCRIPTION



Hourly	Run the workflow every hour.
Every 6 Hours	Run the workflow every six hours.
Every 24 Hours	Run the workflow every day.
Every 2 Days	Run the workflow every two days.
Every 14 Days	Run the workflow every two weeks.
Every 30 Days	Run the workflow every month.

#### Schedule

#### SELECTION DESCRIPTION

Daily	Allows you to run the workflow at a specific time every day.
Weekly	Allows you to run the workflow at a specific time, on a specific day, every week.

- 6. Select whether or not to receive **Feed Health Notifications** See the Workflow Health Notifications section for more information.
- 7. **Debug Option** The Debug Option checkbox gives you the option to save raw data response files for troubleshooting purposes. Since this option uses a large amount of disk space, it defaults to unchecked. We recommend temporarily enabling the option when you are troubleshooting a workflow issue.
- 8. Click Save.
- 9. Click the **Enable/Disable** toggle to enable the workflow.



# **Performing Manual Workflow Runs**



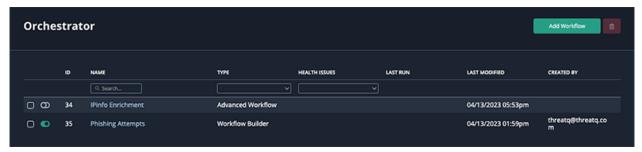
#### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

The **Run Workflow** button in a workflow's configuration screen gives you the option to initiate a manual run between scheduled runs.

1. Click the **Orchestrator** option in the main navigation.

The Orchestrator page lists installed workflows.



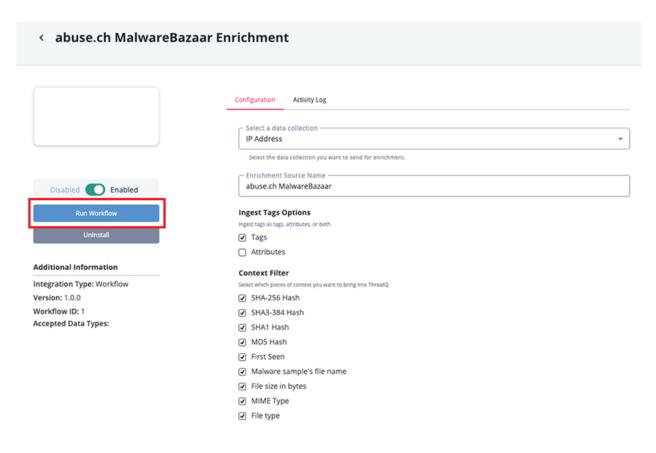
2. Locate and click the workflow you want to run.

The workflow's details page is displayed.



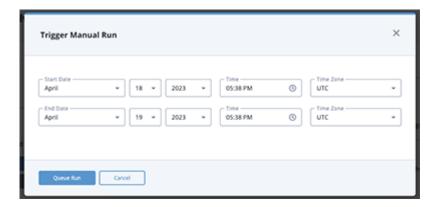
#### < abuse.ch MalwareBazaar Enrichment Select the data collection you want to send for enrichment Enrichment Source Name abuse.ch MalwareBazaar Disabled Enabled Ingest Tags Options Ingest tags as tags, attributes, or both ✓ Tags ☐ Attributes Additional Information **Context Filter** Integration Type: Workflow Select which pieces of context you want to bring into ThreatQ Version: 1.0.0 ✓ SHA-256 Hash Workflow ID: 1 ✓ SHA3-384 Hash Accepted Data Types: SHA1 Hash ✓ MD5 Hash First Seen ✓ Malware sample's file name ✓ File size in bytes ✓ MIME Type File type

3. Click the Run Workflow button.



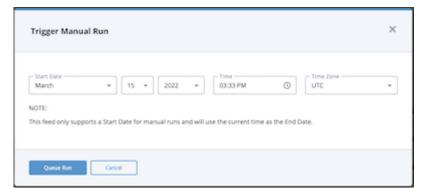


4. Review and/or update the Start and End (if supported) dates and Time as well as the Time Zone fields. These fields default to the current date and time. When referencing a Data Collection, the Start Date value will reflect the Last Modified fields for threat objects.





Not all advanced workflows support the End Dates. If that case, you will only be able to select a Start Date.



5. Click the **Queue Run** button.

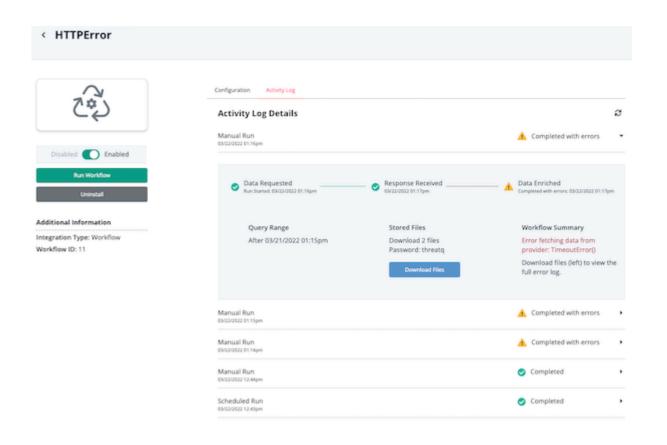
The workflow's Activity Log will load. See the Viewing the Activity Log for more information regarding the Activity Log.



#### < abuse.ch MalwareBazaar Enrichment Configuration Activity Log ø **Activity Log Details** : In Progress Manual Run Disabled Enabled Response Received Additional Information Query Range Workflow Summary 04/18/2023 05:35pm to 04/19/2023 Download 36 files Integration Type: Workflow 1326 Indicators 05:35pm Password: threatg Workflow ID: 1 Accepted Data Types: Scheduled Run Completed

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If the workflow encountered errors, you can click the **Download Files** button to download a zip file(s) containing the error log(s). When you open the zip file(s) you are prompted to enter the Password displayed above the Download Files button.

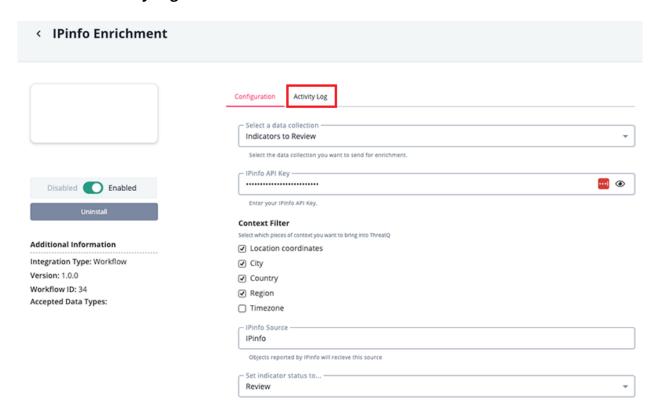




# **Viewing the Activity Log**

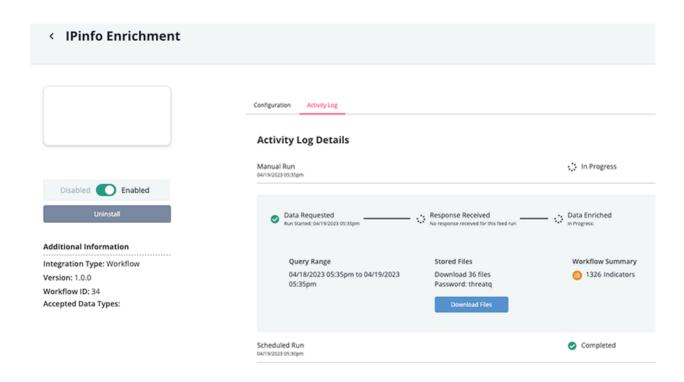
You can view the Activity Log for an Advanced Workflow from its details page.

- 1. Navigate to the Orchestrator landing page.
- 2. Click on the name of the Advanced Workflow to open its details page.
- 3. Click on the **Activity Log** tab to view run details.



The Activity log will load.





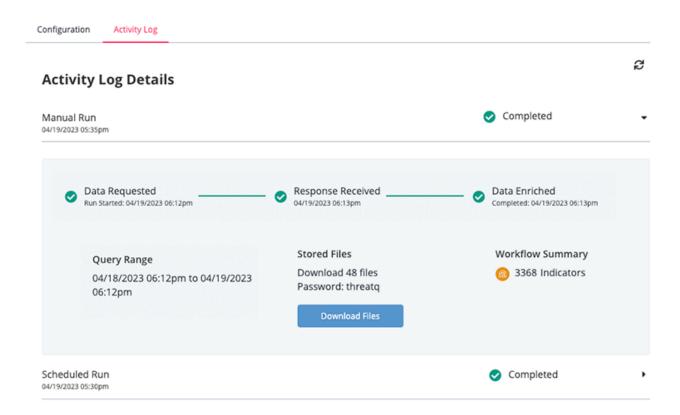
### **Activity Log Details**

You can view the following information from the Activity Log:



FIELD	DESCRIPTION
Type of Run	Whether the run was a scheduled or manual run.
Data Requested	The timestamp of when the data was requested.
Response Received	The timestamp of when a response from the provider was received.
Data Enriched	The timestamp of when the action enrichment was completed.
Query Range	The dataset range for the information.
Stored Files	Files downloaded during the run and the password to open the files. If the workflow encountered errors, you can click the <b>Download Files</b> button to download a zip file(s) containing the error log(s). When you open the zip file(s) you are prompted to enter the Password displayed above the Download Files button.
Workflow Summary	A breakdown of the specific types of system objects were ingested during the run.







# **Deleting an Advanced Workflow**



#### THREATQ REQUIRED PERMISSIONS

**Default ThreatQ Role:** Administrative or Maintenance **Custom - Action Permissions Role:** Orchestration - Edit Orchestrations Workflows

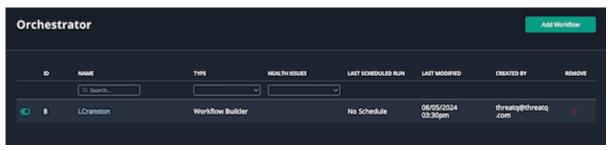
There are two ways to delete an Advanced Workflow.



Deleting an Advanced Workflow will not delete the data already ingested into the ThreatQ platform.

### **Deleting a Workflow from the Orchestrator Page**

1. For the workflow you want to delete, click the red trashcan icon in the Remove column.



2. Click the **Delete Workflow** button, when prompted, to confirm deletion.

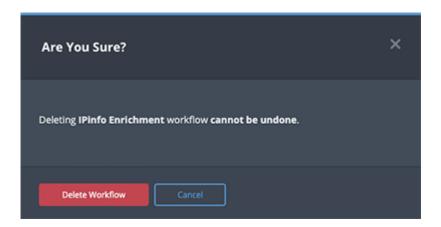
### **Deleting from the Orchestrator Page**

- 1. Navigate to the Orchestrator landing page.
- 2. Select the checkbox next to advanced workflow to delete.
- 3. Click on the **red trashcan icon** located to the top right of the page.



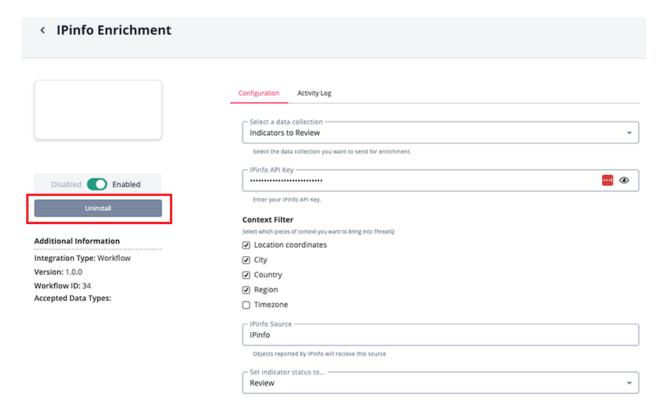


4. Click on **Delete Workflow**, when prompted, to confirm deletion.



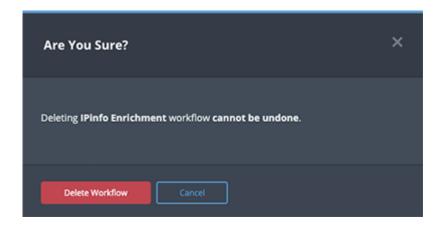
### **Deleting from the Advanced Workflow Details Page.**

- 1. Navigate to the Orchestrator landing page.
- 2. Click on the advanced workflow's name to load its details page.
- 3. Click on the **Uninstall** option.





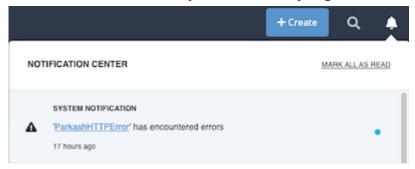
4. Click on **Delete Workflow**, when prompted, to confirm deletion.





# **Workflow Notifications**

Workflow Health Notifications allow the ThreatQ application to send you, and other designated users, email and in-app notifications when a workflow encounters an issue. The in-app notifications appear in Notification Center for users with an administrator or maintenance account. These notifications include a link that redirects you to the Activity Log tab for the workflow.



The emails contain useful information such as connection information, data ingested, and an ingestion summary. See the Notifications topic for more information.



# **Tips and Tricks**

- You can move the node graph to a new position on the screen by clicking and dragging any node.
- Workflows require a data collection and at least one action in order to run. The exception to this is when using a manually triggered workflow. In that scenario, the workflow does not require a set data collection.
- The info menu for any data collection included in a workflow, lists the workflow name in the Used by section. See the Managing Search Results topic for more information.





# **Change Log**

#### Version 2.4.0



The following updates were included with ThreatQ version 6.7.0

- Custom User Role permissions
- Version 2.3.0



The following updates were included with ThreatQ version 6.3.0

- The Orchestrator page now includes a Remove column that lists a delete icon for each workflow.
- Resolved the following issues:
  - When you clicked the Select a data collection field in the workflow builder page, the dropdown list was embedded in the field instead of displaying on top of the field.
  - We updated the workflow node view to automatically resize each action's icon.
  - When you executed a manual workflow run of a TQO bulk changes action from the Threat Library or an object's details page, the workflow was applied to all objects in the data collection instead of to the selected object(s). We updated the manual workflow process for TQO bulk changes actions to apply to selected objects only.

#### Version 2.2.0



The following updates were included with ThreatQ version 5.29.1

- The following TQO actions are no longer seeded in new ThreatQ installations: GreyNoise Community, IPInfo, Shodan, and VirusTotal
   Instead, these actions can be downloaded from the ThreatQ Marketplace. This change does not remove these actions from any existing ThreatQ instances.
- · Version 2.1.0



The following updates were included with ThreatQ version 5.17.0

- The Threat Library results list allows you to select multiple objects of the same type for workflows.
- Resolved the following issues:
  - The data collection pane included Filter Set fields in the Search Criteria section even though the data collection did not include a filter set. Now, the data collection pane displays the following message for a data collection that does not include a filter set: No search criteria to display.



 ThreatQ allowed you to install TWO actions in instances that did not have the required ThreatQ version or a later version. For instance, you could install an action with a required ThreatQ version of 5.13.0 or later in a ThreatQ v5.12.1 instance.

#### Version 2.0.0

- Reformatted Guide and contents.
- Version 1.4.0



The following updates were included with ThreatQ version 5.15.0

- TQO now supports the enrichment of all system object types.
- The Last Run column on the Orchestrator landing page has been updated to Last Scheduled Run.
- Resolved the following issues:
  - The workflow node view truncated the bottom of workflow names that included a letter with a descender, such as p or q.
  - When you uploaded a new version of an action that included a change to the action's name, the name change was reflected in the action configuration panel for existing TQO workflows but not in the node view. Now, action name changes are reflected in the configuration panel and node view.
  - In the workflow node view, we updated the Search Criteria display in the data collection details panel to be consistent with ThreatQ styles and formatting.

#### Version 1.3.0



The following updates were included with ThreatQ version 5.14.0

- You can now perform manually triggered actions from the Threat Library and Object Details page.
- Resolved the following issues:
  - When you installed a group of actions from a single YAML file, any action with a namespace value that included a capital letter failed to install.
  - When you uninstalled an action, the **Are You Sure?** confirmation window listed the action name as undefined.
  - When you created a workflow without selecting a run schedule, TQO ran the workflow as soon as you enabled it.
  - In the Orchestrator page, the display of workflows with IDs of two or more digits was wrapped so that the digits displayed on separate lines.

#### Version 1.2.0



The following updates were included with ThreatQ version 5.12.0

- TQO actions can now be installed with provider icons.
- You can now change the name of a workflow created in TQO for the workflow node view.
- Resolved the following issues:
  - The Light mode version of the workflow Node View did not display the Virus Total action's logo. In addition, the display of the action node connector lines was not consistent with ThreatQ standards.
  - We resolved the following issues with the display of workflow names:



- When you viewed a workflow created in TQO, the browser page title displayed the unique workflow ID (stored in the name field).
- When you upgraded to ThreatQ 5.9, the system populated the new display\_name field with the unique workflow ID instead of populating that value in the name field. As a result, the display names for your existing workflows were changed to the corresponding unique workflow IDs.



This issue only affected workflows created in TQO. It did not affect advanced workflows.

- Version 1.1.0
  - Updates for version 5.8.0
- Version 1.0.0
  - Initial Release