

Creating a Playbook Automation Rule

Last Modified on 05/01/2025 11:48 am EDT

Overview

To begin using the Playbook Automation features, users must first create a **Playbook Automation Rule**. After creating a Playbook Automation Rule, additional configuration will automatically be inserted into the user's Org.



Note:

Playbooks Automation is an additional paid for feature. If you're interested in this feature and would like to know more, please contact your Customer Success Manager.

User Account Requirements

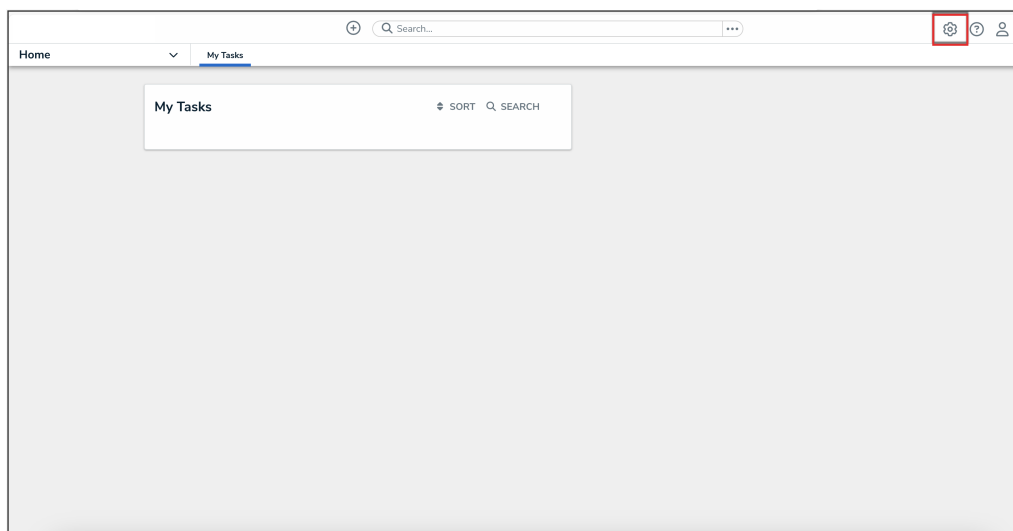
The user account you use to log into Resolver must be an Administrator to create a Playbook Automation Rule.

Related Information/Setup

Please refer to the [Playbooks Automation](#) section for more information on using playbooks in Resolver.

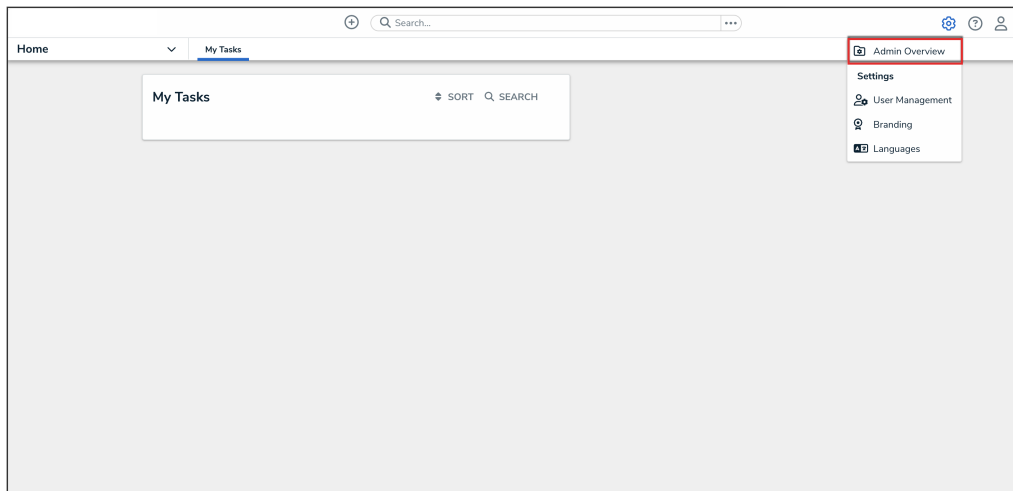
Navigation

1. From the **Home** screen, click the **Administration** icon.



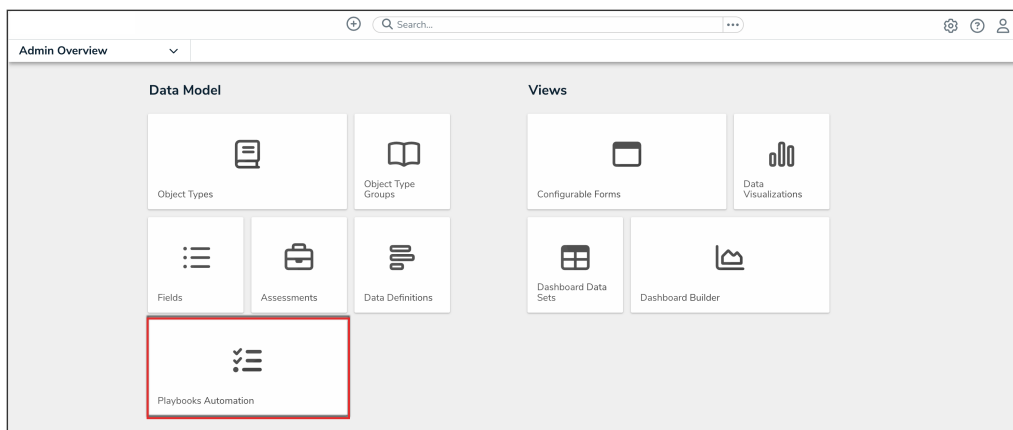
Administration Icon

- From the **Administrator Settings** menu, click **Admin Overview**.



Administrator Settings Menu

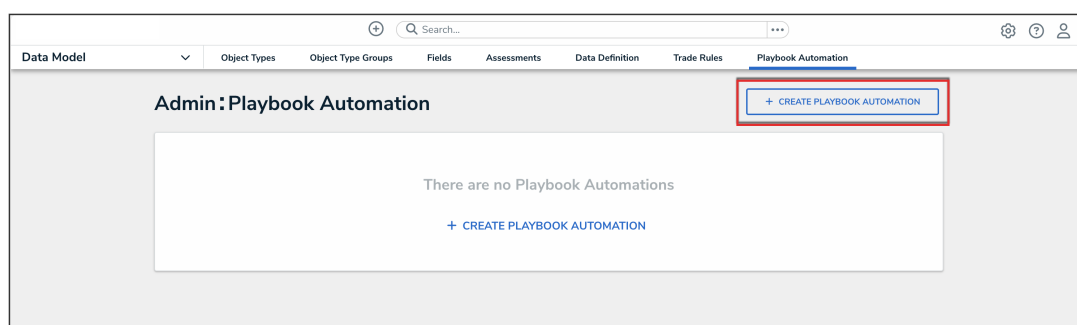
- From the **Admin Overview** screen, click the **Playbooks Automation** tile under the **Data Model** section.



Playbooks Automation Tile

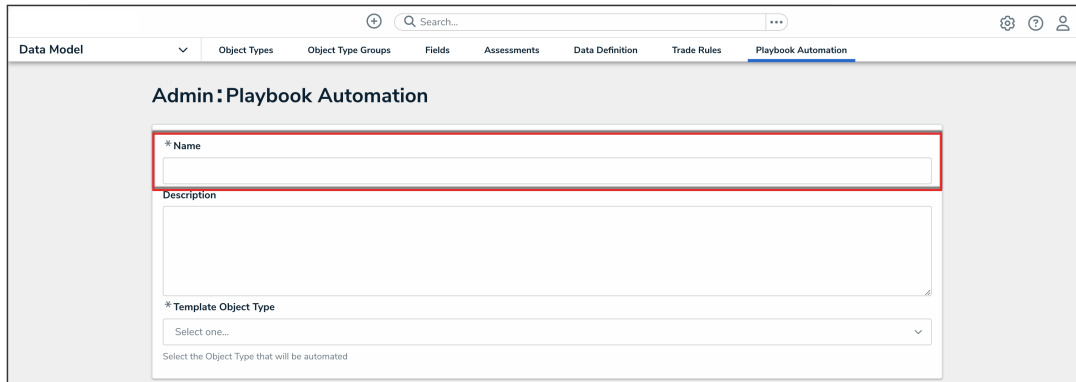
Creating a Playbook Automation

- Click the **Create Playbook Automation** button.



Create Playbook Automation Button

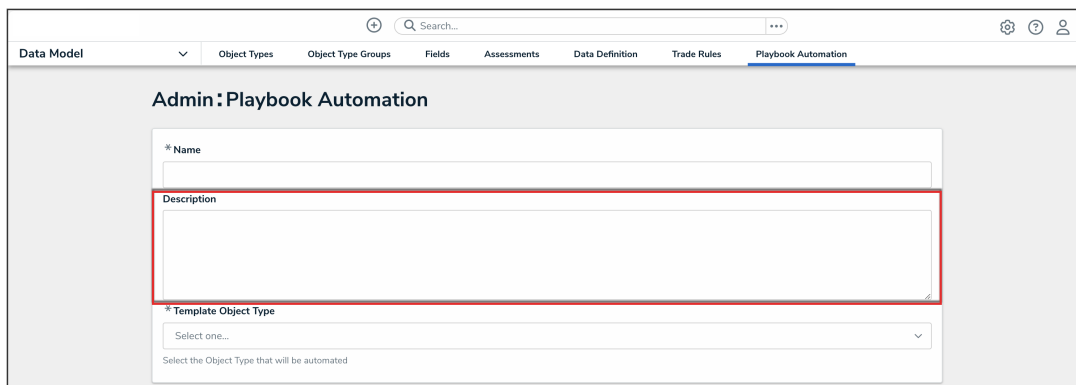
2. Enter a name for the Playbook Automation in the **Name** field.



The screenshot shows the 'Admin: Playbook Automation' form in the Resolver application. The form has a header bar with navigation tabs: Data Model, Object Types, Object Type Groups, Fields, Assessments, Data Definition, Trade Rules, and Playbook Automation. The 'Playbook Automation' tab is selected. The form contains three main sections: a text input field for '* Name', a text area for 'Description', and a dropdown menu for '* Template Object Type'. The '* Name' field is highlighted with a red border.

Name Field

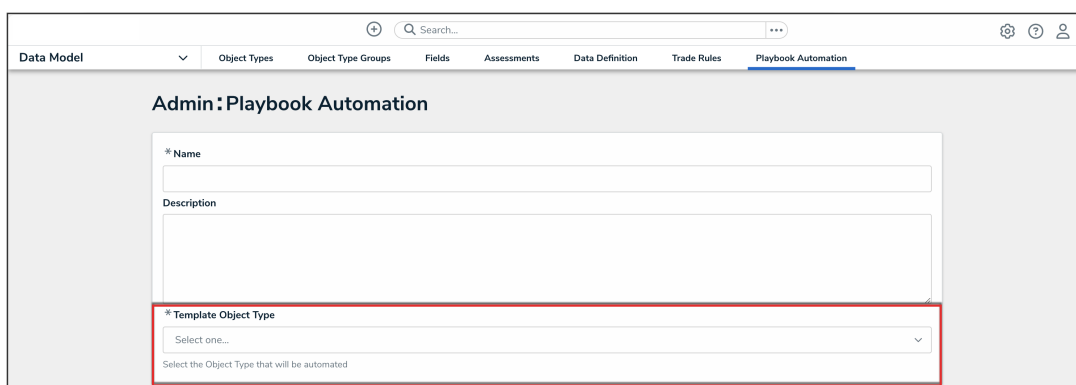
3. **(Optional)** Enter a description of the Playbook Automation in **Description** field.



The screenshot shows the 'Admin: Playbook Automation' form in the Resolver application. The form has a header bar with navigation tabs: Data Model, Object Types, Object Type Groups, Fields, Assessments, Data Definition, Trade Rules, and Playbook Automation. The 'Playbook Automation' tab is selected. The form contains three main sections: a text input field for '* Name', a text area for 'Description', and a dropdown menu for '* Template Object Type'. The 'Description' text area is highlighted with a red border.

Description Field

4. From the **Template Object Type** drop-down, select the template object type for the Playbook Automation. This is the object type that you want to automate for the Playbook Automation Rule. It is recommended that task is selected as the template object type to help with task templating and automating execution of your Standard Operating Procedures.



The screenshot shows the 'Admin: Playbook Automation' form in the Resolver application. The form has a header bar with navigation tabs: Data Model, Object Types, Object Type Groups, Fields, Assessments, Data Definition, Trade Rules, and Playbook Automation. The 'Playbook Automation' tab is selected. The form contains three main sections: a text input field for '* Name', a text area for 'Description', and a dropdown menu for '* Template Object Type'. The '* Template Object Type' dropdown menu is highlighted with a red border.

Template Object Type Drop-down

Note: The Playbook Automation feature supports only one template object type per Org.

- From the **Applied Object Type** drop-down, select the object type that the automation will be applied to (e.g. **Incident**).

The screenshot shows the 'Admin: Playbook Automation' form. The 'Applied Object Type' field is highlighted with a red box. It is a drop-down menu with the text 'Select one...' and a small downward arrow. Below the field, it says 'Select where the automation will be applied to'. Other fields visible include 'Name' (Task Templating), 'Description', 'Template Object Type' (Task), and 'Driver Object Type(s)'.

Applied Object Type Drop-down

- From the **Driver Object Type(s)** drop-down, select the driver object type which will drive the logic of the automation. Choose an object type that stores category type data (e.g., Incident Type or Region).

The screenshot shows the 'Admin: Playbook Automation' form. The 'Driver Object Type(s)' field is highlighted with a red box. It is a drop-down menu with the text 'Select one...' and a small downward arrow. Below the field, it says 'Select what the automation will be based on'. Other fields visible include 'Name' (Task Templating), 'Description', 'Template Object Type' (Task), and 'Applied Object Type' (Incident).

Driver Object Type(s) Drop-down

- Click the **Creation Trigger** field and select a creation trigger from the drop-down menu. The Creation Trigger defines the workflow state that automated tasks move to when created.



Note:

Once linked to a Playbook Automation rule, the trigger on **Creation** can no longer be deleted from the workflow. To delete the trigger, update the mapping on the automation rule to point to another trigger first.

Fields to include	
Assigned Date	FIELD DATE & TIME
Check Date	FIELD DATE & TIME
Completed	FIELD SELECT LIST
Completed Date	FIELD DATE & TIME
Due Date	FIELD DATE & TIME
External Data Source	FIELD SELECT LIST
Overdue	FIELD SELECT LIST
Priority	FIELD SELECT LIST
Requires Attachment	FIELD SELECT LIST
Task Related Information	FIELD PLAIN TEXT
Task Response	FIELD PLAIN TEXT
Task Type	FIELD SELECT LIST

Creation Trigger Drop-down Menu

- (Optional - due dates can be auto calculated on generated tasks):** From the **Due Date** drop-down, select a Date & Time field to be used for the generated tasks.



Note:

Details within each Task template can be used to optionally specify the 'number of days' to be used to calculate the **Due Date** on tasks generated.

Set Trigger, Due Date, and Assignee

* Creation Trigger (Task)
Create

Due Date (Task)
Select one...

Assignee (Task)
Select one...

Inherit Assignee (Incident)
Select one...

Fields to include

Field	Type
Assigned Date	FIELD DATE & TIME
Check Date	FIELD DATE & TIME
Completed	FIELD SELECT LIST
Completed Date	FIELD DATE & TIME
Due Date	FIELD DATE & TIME
External Data Source	FIELD SELECT LIST
Overdue	FIELD SELECT LIST
Priority	FIELD SELECT LIST
Requires Attachment	FIELD SELECT LIST
Task Related Information	FIELD PLAIN TEXT
Task Response	FIELD PLAIN TEXT
Task Type	FIELD SELECT LIST

Due Date Drop-down

9. (Optional - generated tasks can be auto assigned to users):

- From the **Assignee** drop-down, select a role to store user task assignments (e.g. **Task assigned to** or **Task owner**). Task templates can be used to specific which user or user group will be assigned to generated tasks.

Set Trigger, Due Date, and Assignee

* Creation Trigger (Task)
Create

Due Date (Task)
Completed Date

Assignee (Task)
Select one...

Inherit Assignee (Incident)
Select one...

Fields to include

Field	Type
Assigned Date	FIELD DATE & TIME
Check Date	FIELD DATE & TIME
Completed	FIELD SELECT LIST
Due Date	FIELD DATE & TIME
External Data Source	FIELD SELECT LIST
Overdue	FIELD SELECT LIST
Priority	FIELD SELECT LIST
Requires Attachment	FIELD SELECT LIST
Task Related Information	FIELD PLAIN TEXT
Task Response	FIELD PLAIN TEXT
Task Type	FIELD SELECT LIST

Assignee (Task) Drop-down



Note:

If the **Assignee** field has **Task Assigned To** selected, the **Inherit Assignee** field must also be selected.

- b. From the **Inherit Assignee** drop-down, select the role to pull task assignments from. Task assignments can also be inherited from the object that the tasks are generated on (applied on). For example, all tasks generated could be auto assigned to the Incident Owner user linked to the incident. Task templates can specify if a generated task assignment is inherited or is assigned to a user or user group.



Note:

Details within each task template can be used to specify if a generated task assignment is inherited or is specifically assigned to a user or user group.

Inherent Assignee (Incident) Drop-down

10. **(Optional - can be prefilled on generated task):** From the **Fields to include** section, select any additional fields you want to include in the task templates.



Note:

Information stored on the task templates in these fields will be copied on each generated task.

The screenshot shows the 'Set Trigger, Due Date, and Assignee' configuration screen. The 'Fields to include' section is highlighted with a red box. It contains a list of fields with their respective data types:

Field	Data Type
Assigned Date	DATE & TIME
Check Date	DATE & TIME
Completed	SELECT LIST
Due Date	DATE & TIME
External Data Source	SELECT LIST
Overdue	SELECT LIST
Priority	SELECT LIST
Requires Attachment	SELECT LIST
Task Related Information	PLAIN TEXT
Task Response	PLAIN TEXT
Task Type	SELECT LIST

Fields to Include Section

- Click the **Create** button. The system will automatically generate most of the required configuration for implementing Playbook Automations.



Warning:

Please confirm all the details for the Playbook Automation Rule before creating as the template object type can't be changed and the driver object types can't be removed (they can, however, be added to). The **Due Date**, **Assignee**, and **Fields to Include** fields can be edited, but will require additional updates to the relevant forms.

The screenshot shows the 'Set Due Date & Assignment' configuration screen. The 'CREATE' button is highlighted with a red box. The screen displays configuration options for 'Due Date (Task)', 'Assignee (Task)', and 'Inherit Assignee (Incident)'. Below these, the 'Fields to include' section is visible, showing a list of fields with their respective data types.

Create Button

- Review the confirmation pop-up and click the **Continue** button to create the Playbook



Note:

The configuration setup will only be auto implemented when creating a Playbook Automation Rule for the first time on the Org.

Continue Button

13. Complete your Playbook Automation implementation by updating existing user flows and loading content to create a Playbook library to automate from. Continue by following these steps next:

- Set up Playbook Automation for the end users to set up the Playbook Automation actions on an existing form and workflow
- Set up Playbook library content to build the Playbook library

Important Notes

- Currently, users can only select one object type per Org as the template object type. Creating additional Playbook Automation Rules (to apply the templated objects to a different object type) will result in a view with a pre-selected value set as the templated object type.
- A Playbook Automation Rule can be updated after creation.
- Deleting a Playbook Automation Rule does not delete the configuration set up in the Org.
- Automated task generation via the workflow action or the form action is limited to 100 objects at a time.
- Currently, Playbooks Automation doesn't support bulk execution (not available on Timed triggers or Consume Orchestration triggers.)

