Add a Run Playbook Automation Action to a Transition

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Overview

The **Run Playbook Automation** action allows Administrators to automate task generation through workflow actions when a playbook is created.

> ***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

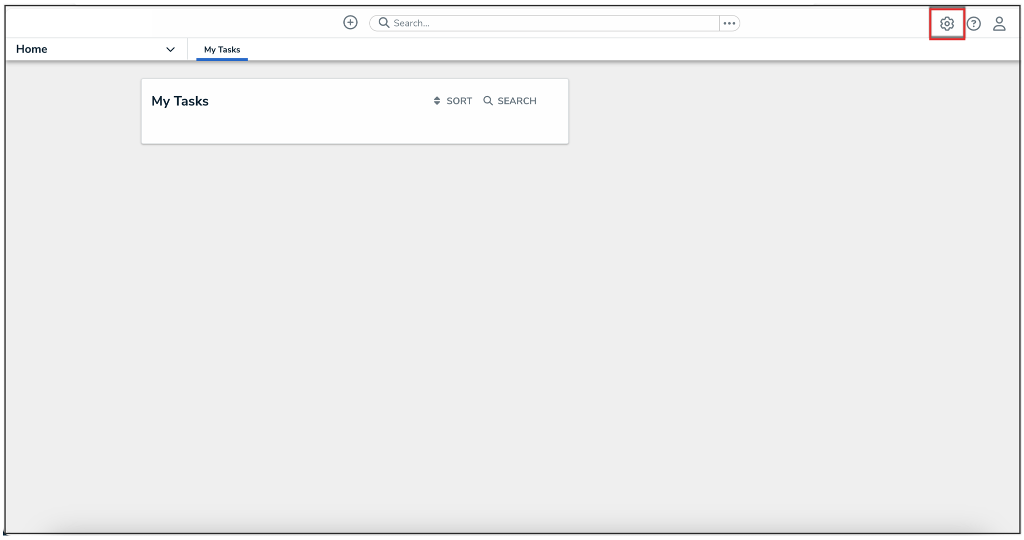
The user account you use to log into Resolver must have Administrator permission to use the Playbook Automation feature.

Related Information/Setup

Please refer to the Playbooks Automation section for more information on using the Playbook Automation feature.

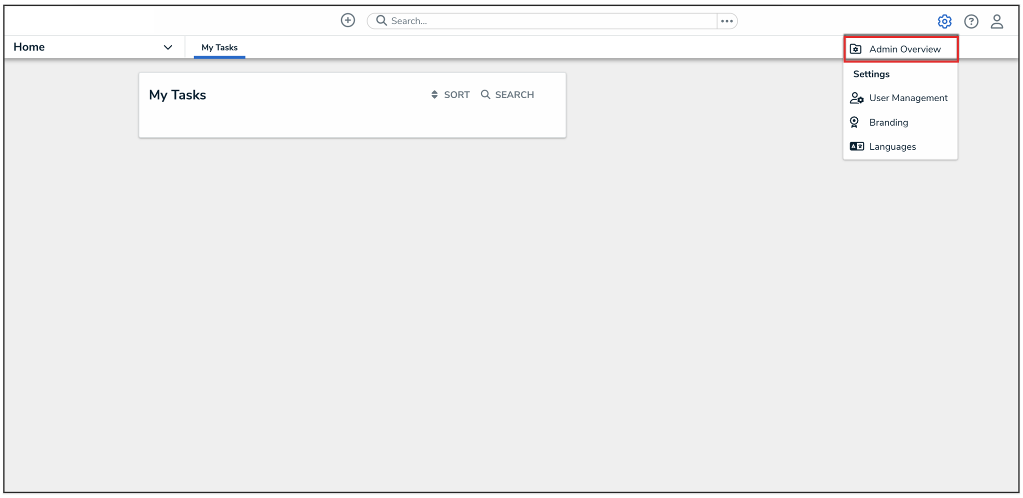
Navigation

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



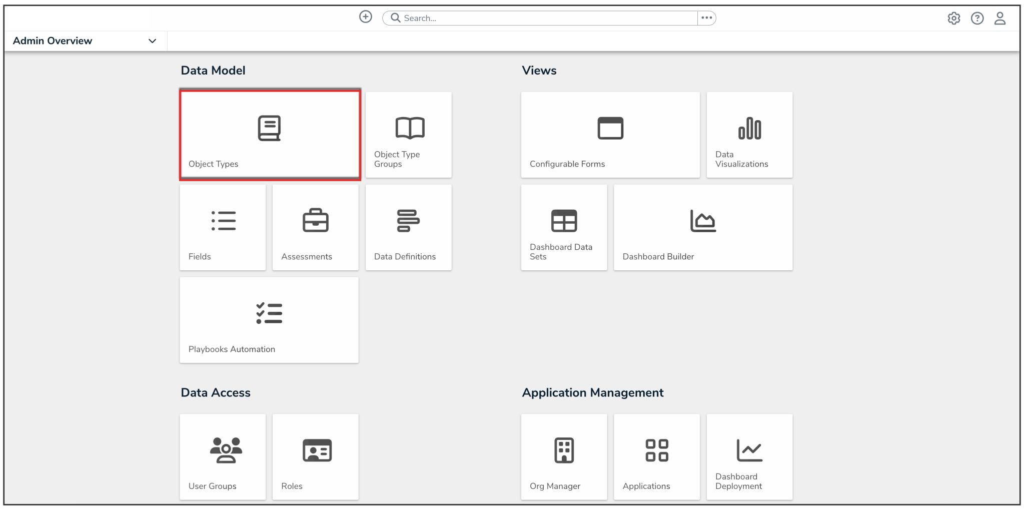
Administration Icon

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



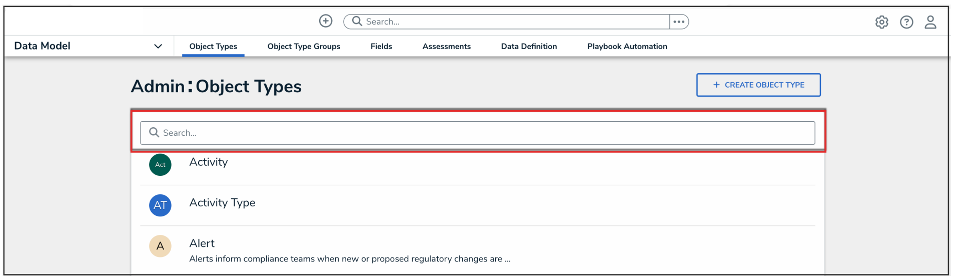
Administrator Settings Menu

3. From the ***Admin Overview*** screen, click the **Object Types** tile under the **Data Model** section.



Object Types Tile

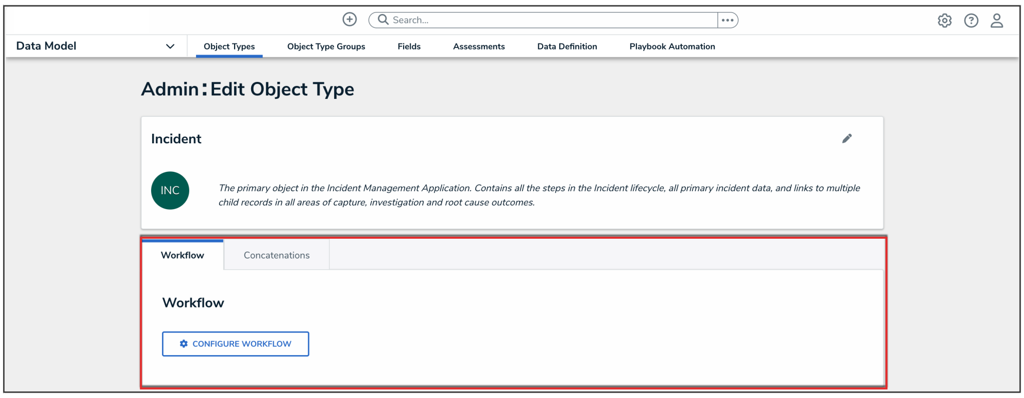
3. From the ***Object Types*** screen, enter an object type name in the **Search** field to narrow down the object types list.



Search Field

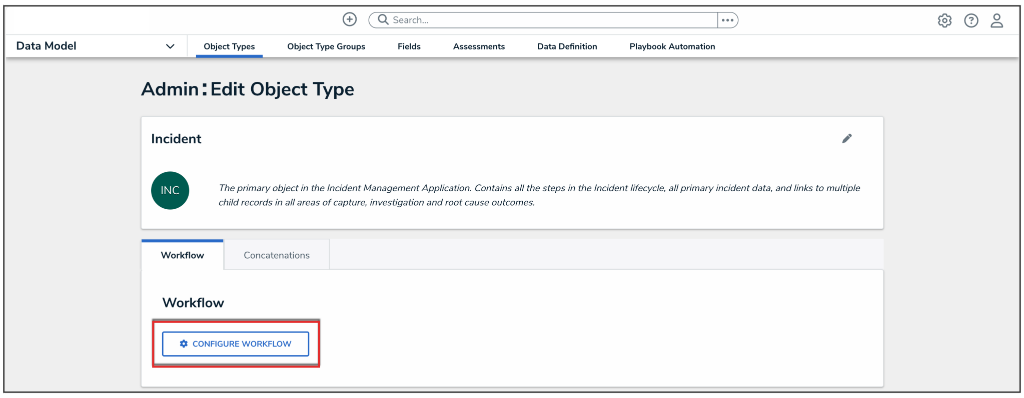
4. Click the object type that you want to edit.

5. From the ***Edit Object Type*** screen, click a workflow under the **Workflow** tab.



Workflow Tab

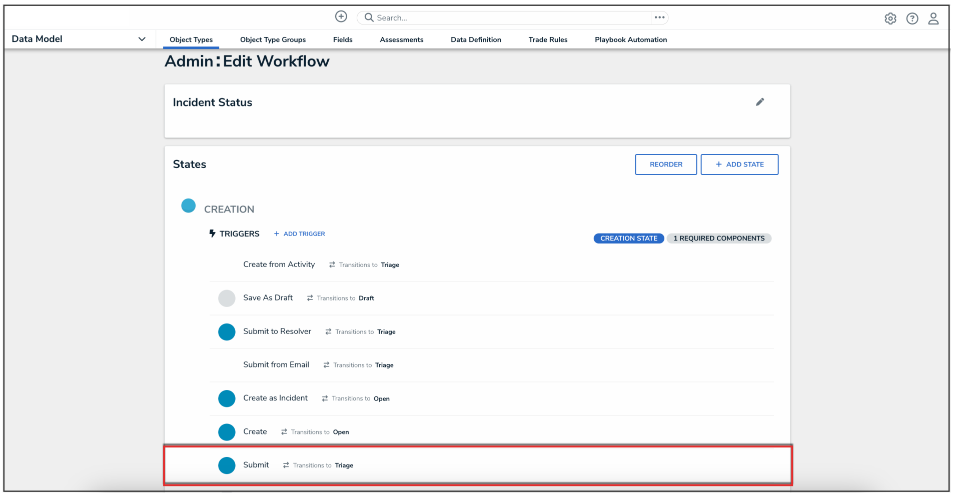
6. If there are no workflows listed, click the **Configure Workflow** button.



Configure Workflow Button

Add a Run Playbook Automation Action to a Transition

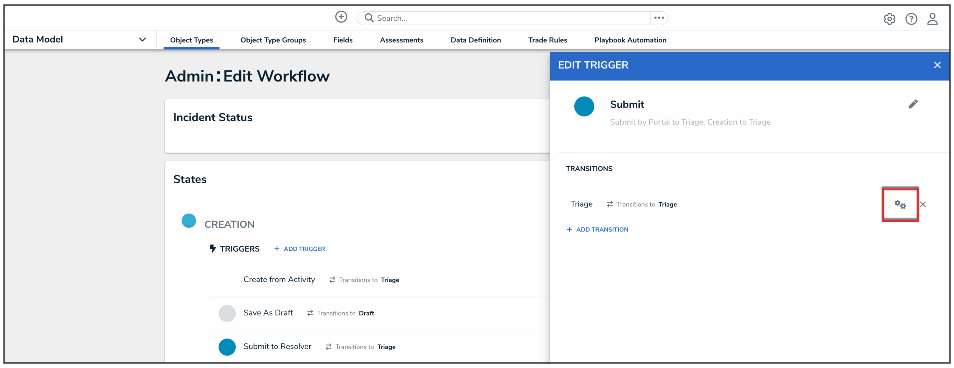
1. From the ***Edit Workflow*** screen, click the trigger that you want to add the Run Playbook Automation action to.



Workflow Trigger

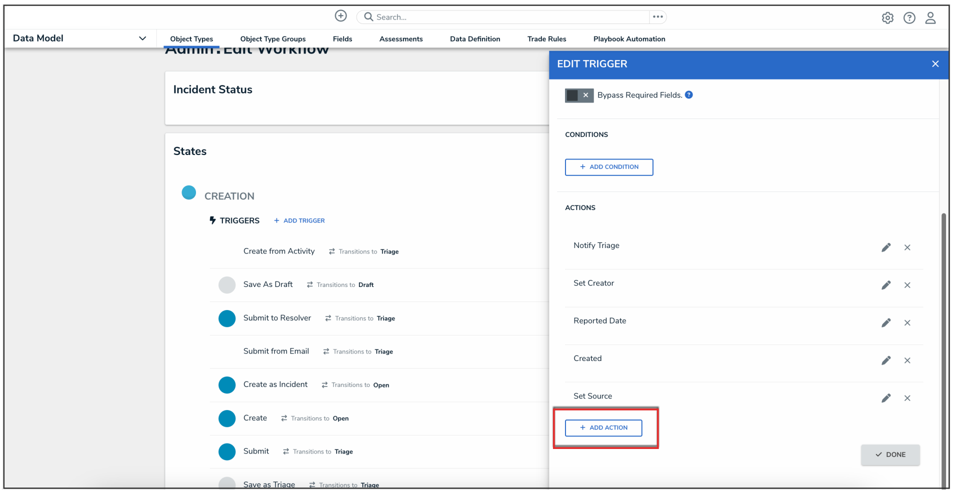
> ***Note:***
> The **Run Playbook Automation** action can only be added to a button trigger.

2. From the **Edit Trigger** pop-up, click the **Configure** icon under **Transitions**.



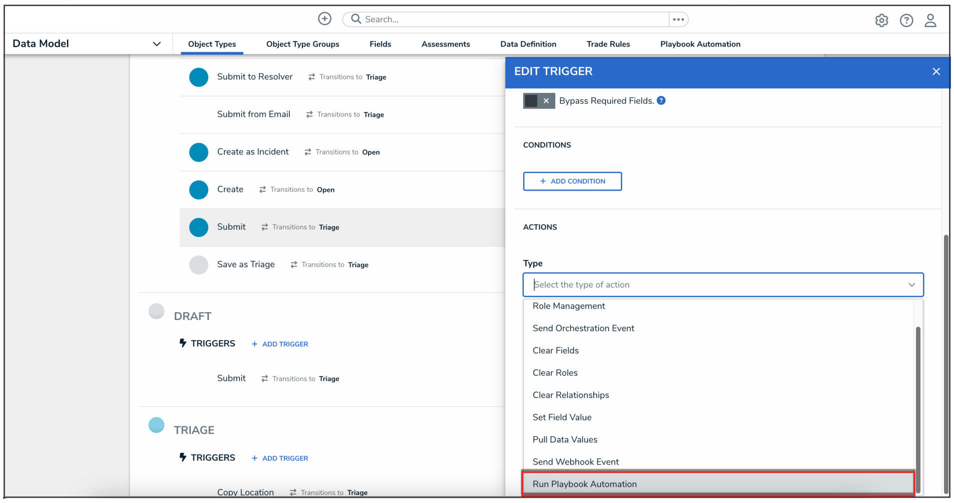
Configure Icon

3. Click the **Add Action** button under **Actions**.



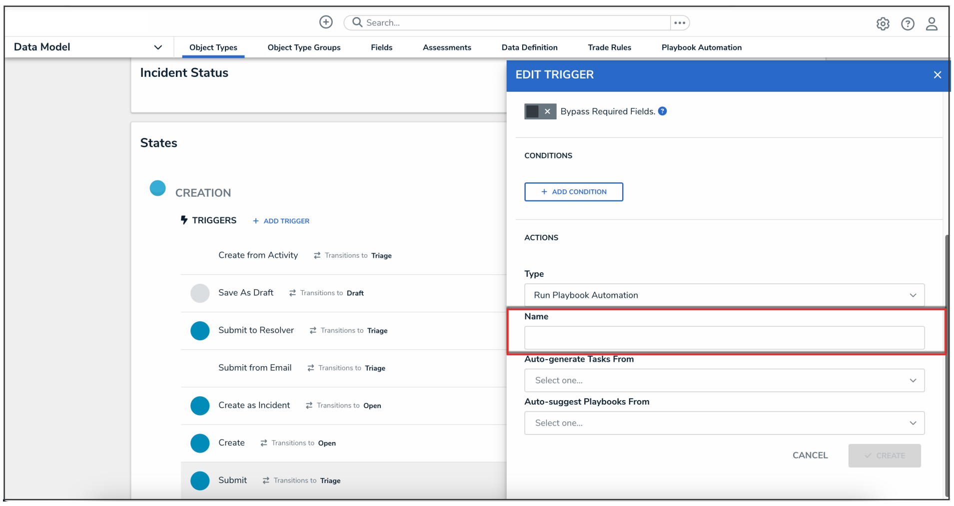
Add Action Button

4. Select **Run Playbook Automation** from the **Type** dropdown menu.



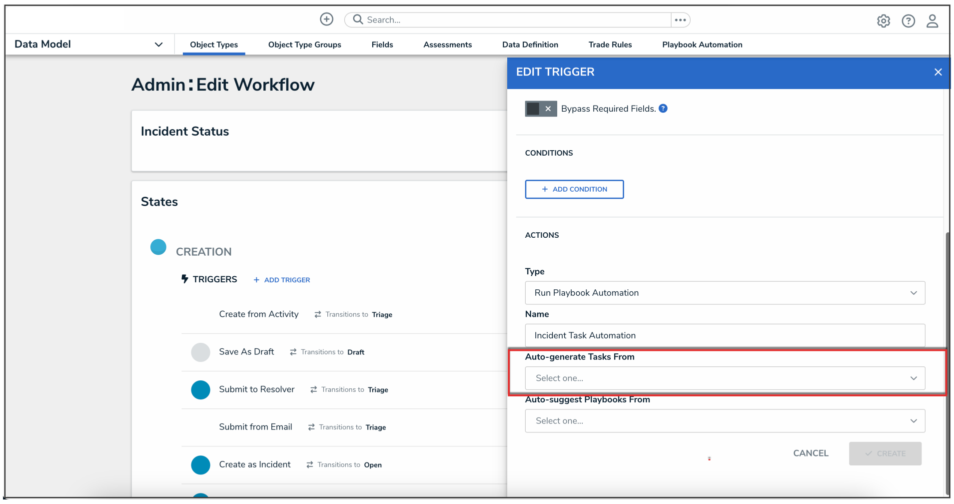
Type Dropdown Menu

5. Type a name for the action in the **Name** field.



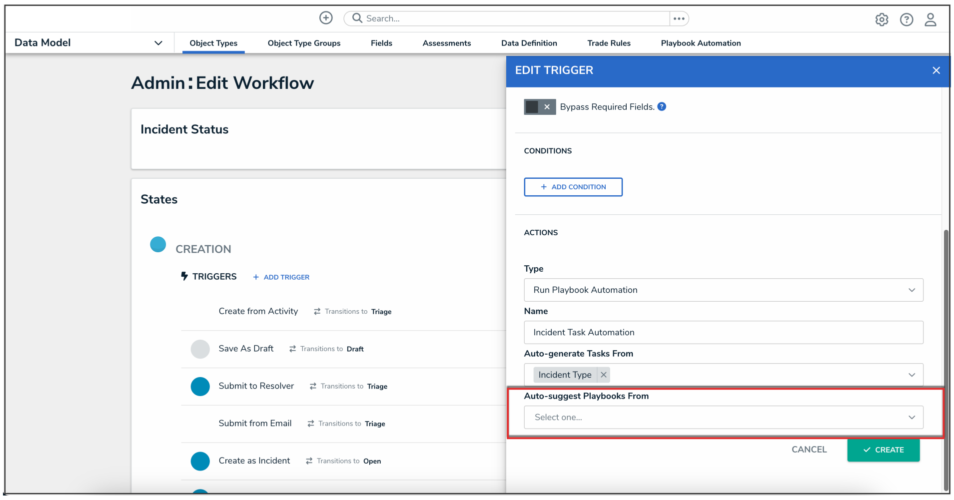
Name Field

6. From the **Auto-Generate Tasks From** dropdown, select a driver object type.



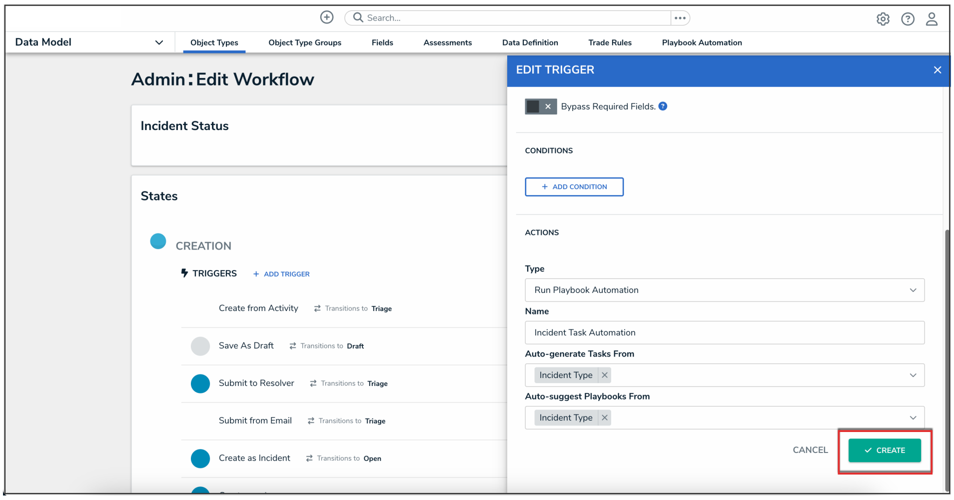
Auto-Generate Tasks From Dropdown Menu

7. From the **Auto-Suggest Playbooks From** dropdown, select a driver object type.



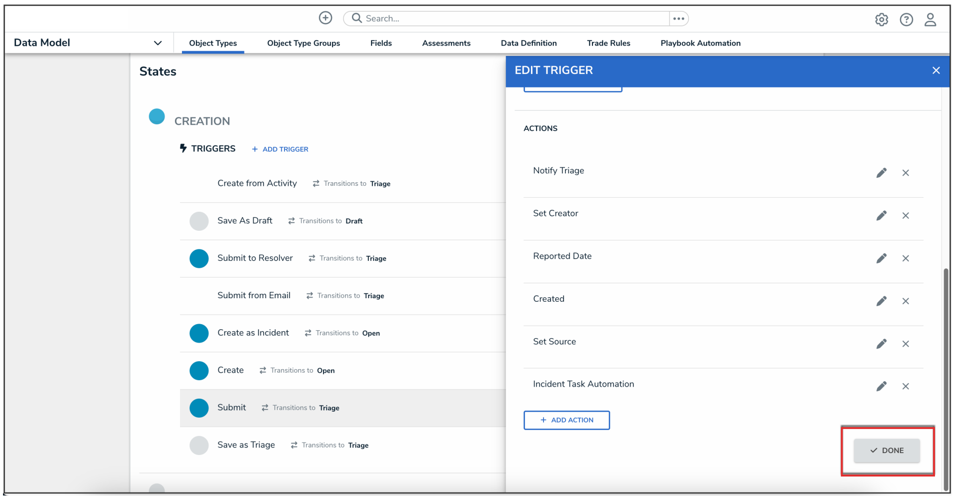
Auto-Suggest Playbooks From Dropdown Menu

8. Click the **Create** button.



Create Button

9. From the **Edit Trigger** pop-up, click the **Done** button to save your changes.



Done Button