

Add a Run Playbook Automation Action to a Transition

Last Modified on 02/14/2025 3:28 pm EST

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

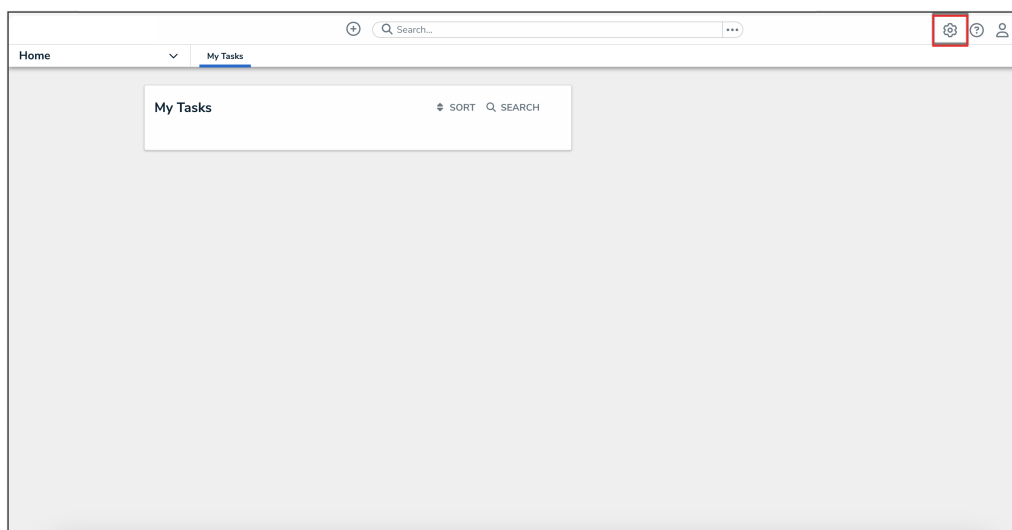
The user account you use to log into Resolver must have Administrator permission to use the Playbook Automation feature.

Related Information/Setup

Please refer to the [Playbooks Automation](#) section for more information on using the Playbook Automation feature.

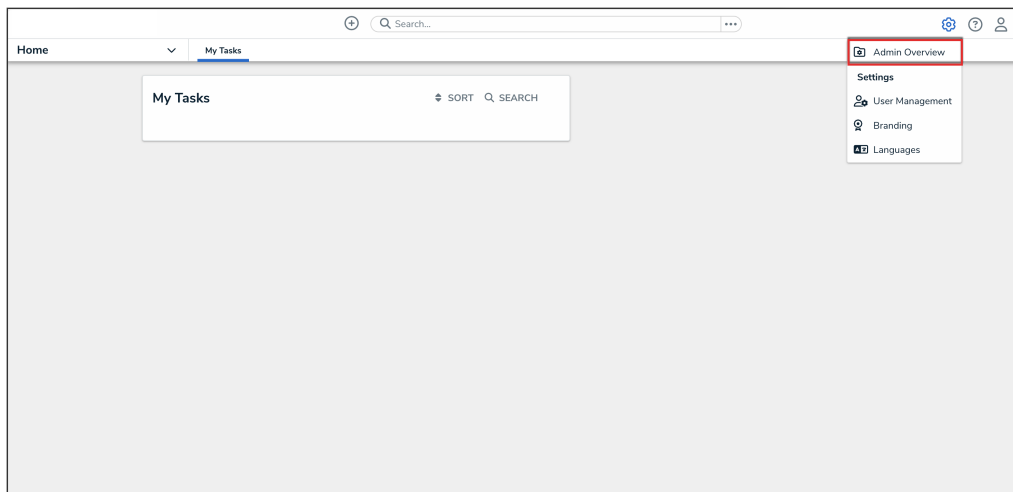
Navigation

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



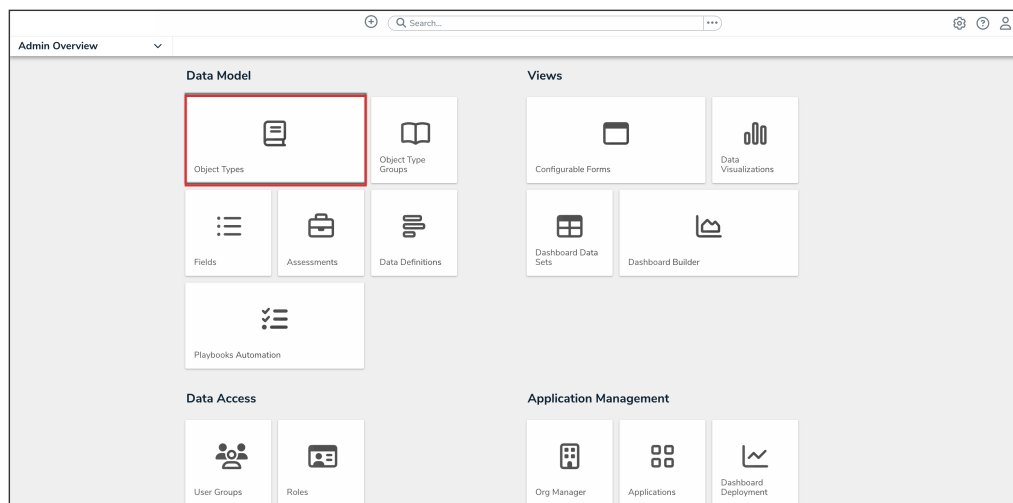
Administration Icon

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



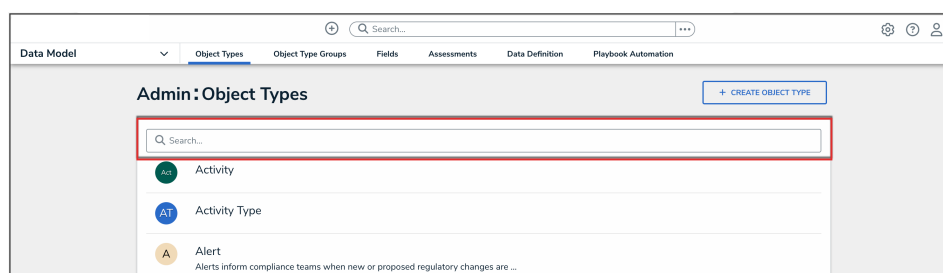
Administrator Settings Menu

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



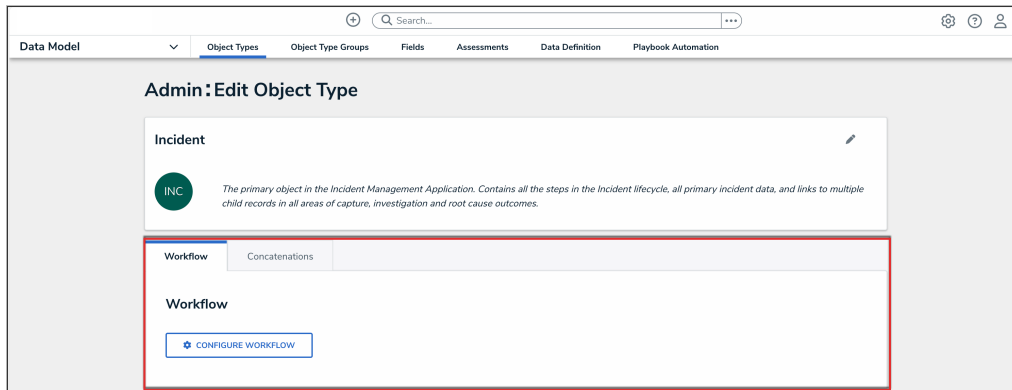
Object Types Tile

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



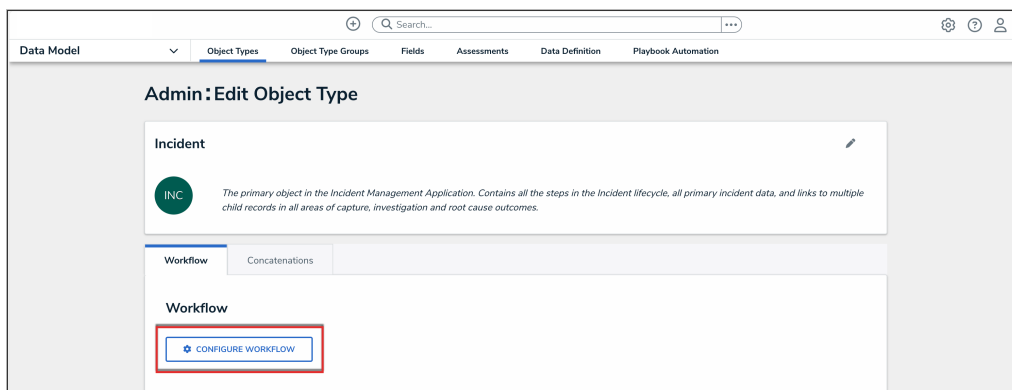
Search Field

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

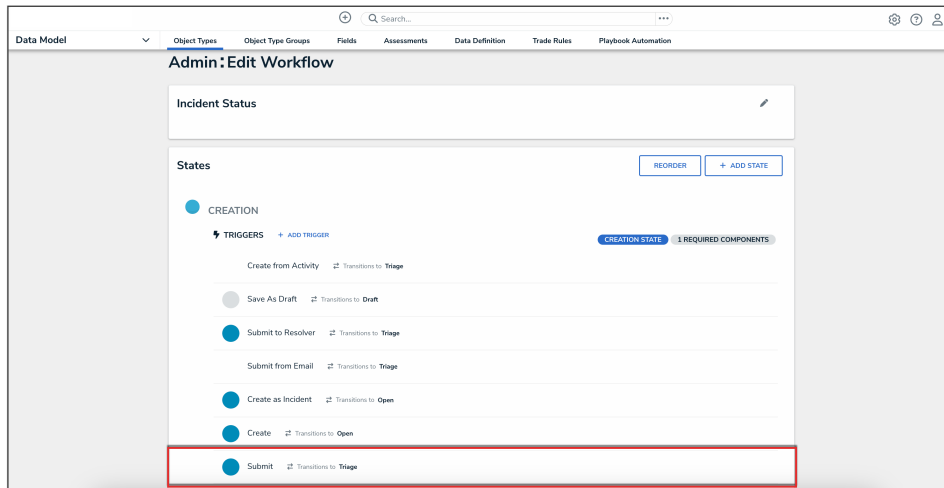
6. If there are no workflows listed, click the **Configure Workflow** button.



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.



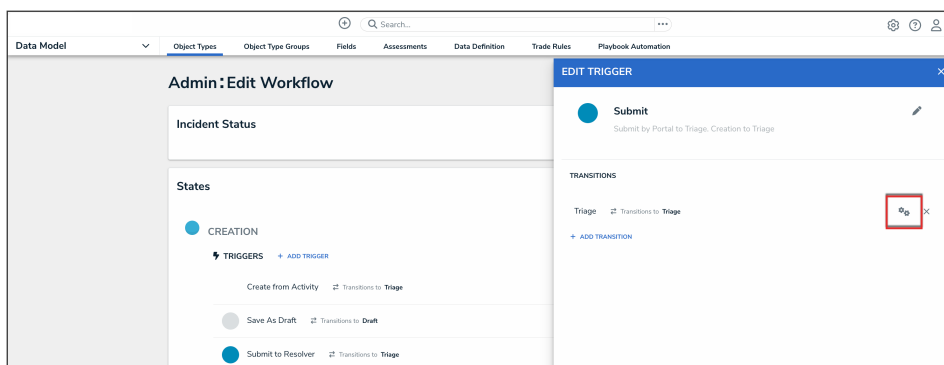
Workflow Trigger



Note:

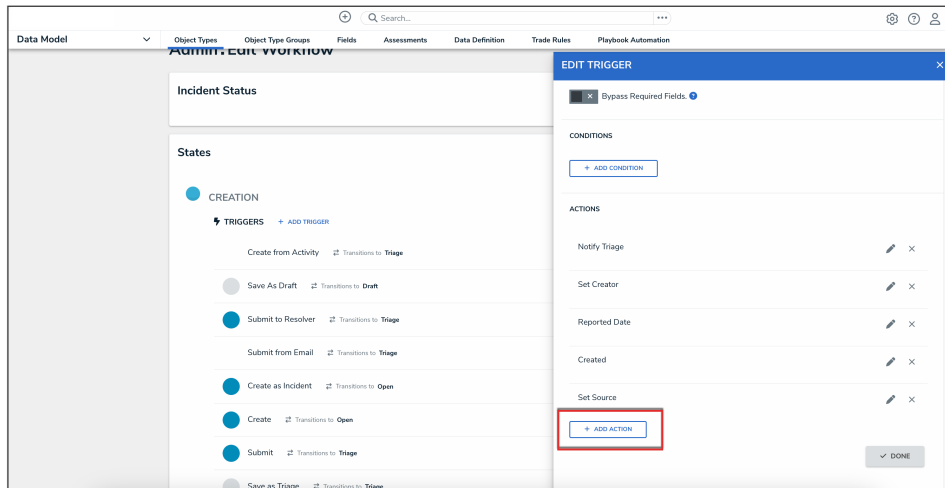
The **Run Playbook Automation** action can only be added to a button trigger.

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



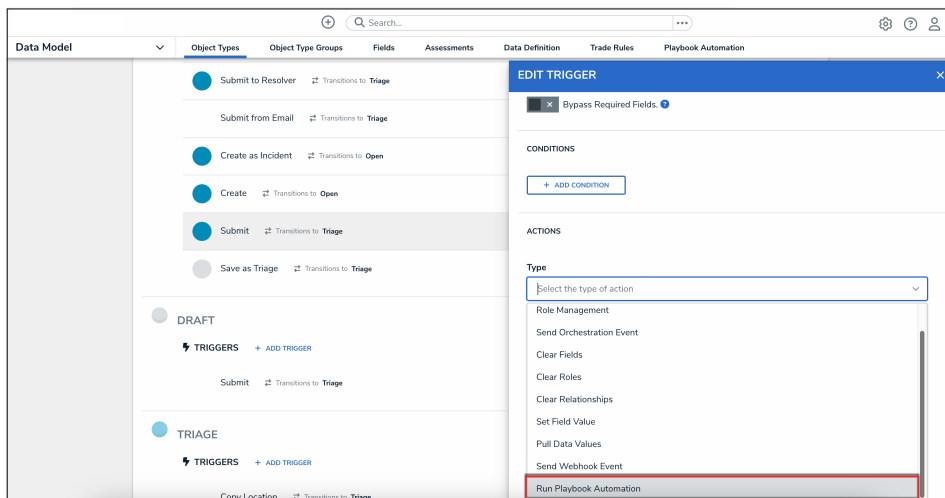
Configure Icon

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



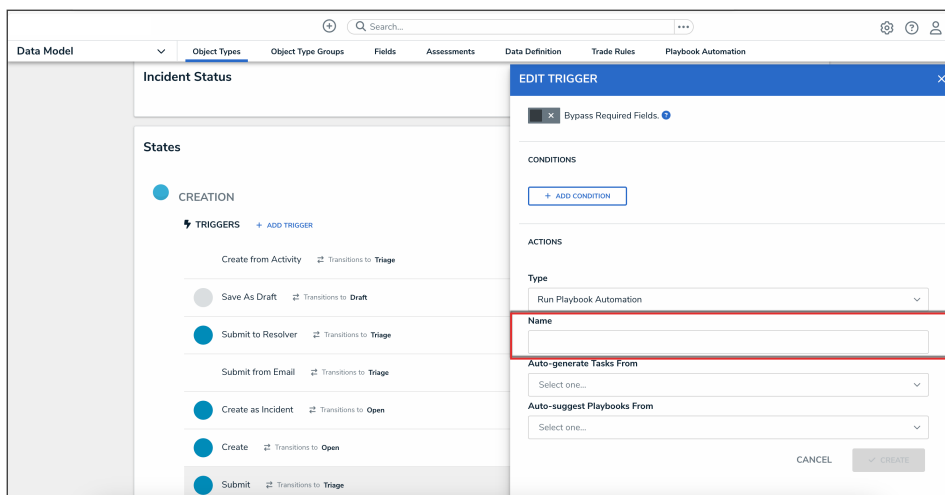
Add Action Button

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

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

The screenshot shows the 'Admin: Edit Workflow' interface. On the left, under 'Incident Status', there is a 'States' section with a 'CREATION' state. Below it, there are several triggers listed, including 'Create from Activity', 'Save As Draft', 'Submit to Resolver', 'Submit from Email', and 'Create as Incident'. On the right, the 'EDIT TRIGGER' modal is open. It has a 'Bypass Required Fields' toggle. Under 'CONDITIONS', there is a '+ ADD CONDITION' button. Under 'ACTIONS', there is a 'Type' dropdown set to 'Run Playbook Automation', a 'Name' field set to 'Incident Task Automation', and two dropdowns: 'Auto-generate Tasks From' (highlighted with a red box) and 'Auto-suggest Playbooks From'. The 'Auto-generate Tasks From' dropdown is currently set to 'Select one...'. At the bottom right of the modal are 'CANCEL' and 'CREATE' buttons.

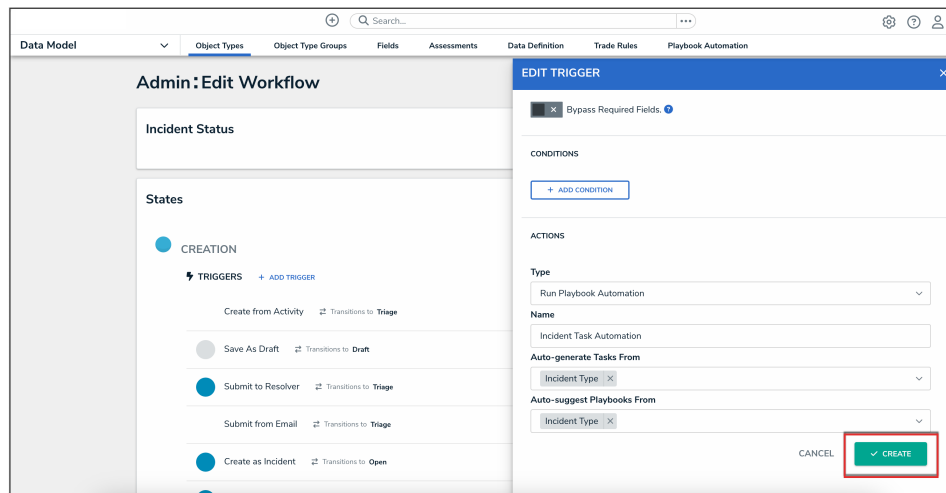
Auto-Generate Tasks From Dropdown Menu

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

This screenshot is similar to the previous one, showing the 'Admin: Edit Workflow' interface and the 'EDIT TRIGGER' modal. In this instance, the 'Auto-suggest Playbooks From' dropdown is highlighted with a red box. The 'Auto-generate Tasks From' dropdown is now set to 'Incident Type'. The 'Auto-suggest Playbooks From' dropdown is currently set to 'Select one...'. The 'CREATE' button is now green and has a checkmark icon.

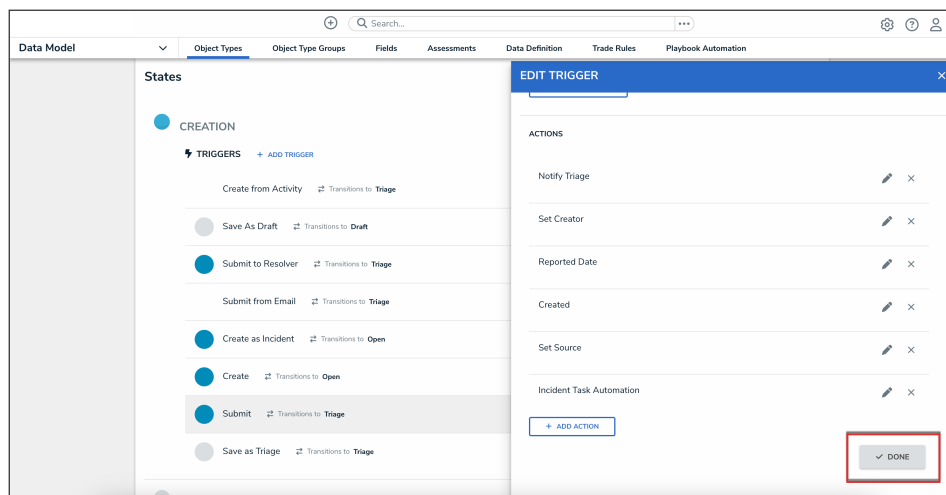
Auto-Suggest Playbooks From Dropdown Menu

- Click the **Create** button.



Create Button

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



Done Button