

Setting Up Playbook Library Content

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Overview

To begin using **Playbooks Automation** in Resolver, playbook library content must be set up by creating playbooks and templated tasks. Users can add templated tasks to task groups to streamline the playbooks automation and workflow by grouping tasks that are often performed together.

Playbook library content can be set up manually by following the steps in this article.

Playbook library content can also be set up in bulk by using the data import feature. When using this feature, select the **Template** workflow state on the task template objects that are to be imported.



Note:

Using data import is recommended for a quick implementation.

User Account Requirements

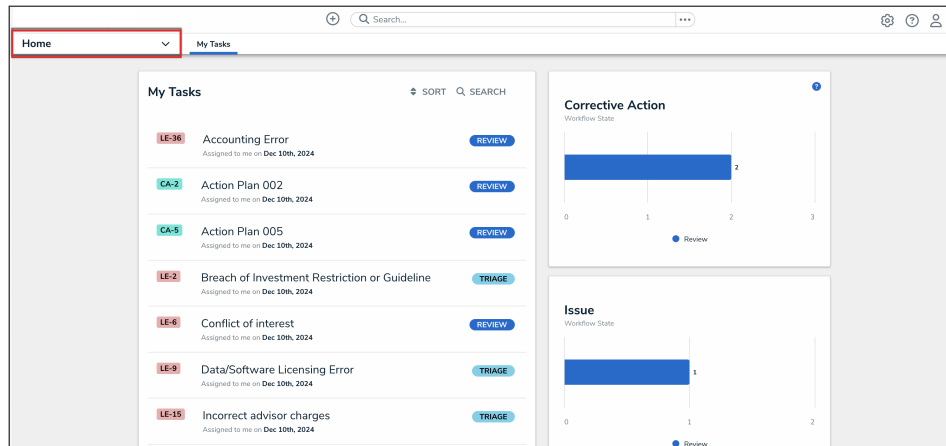
The user account you use to log into Resolver must be assigned to the **Playbook Manager** role to build the Playbook Automation content library.

Related Information/Setup

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

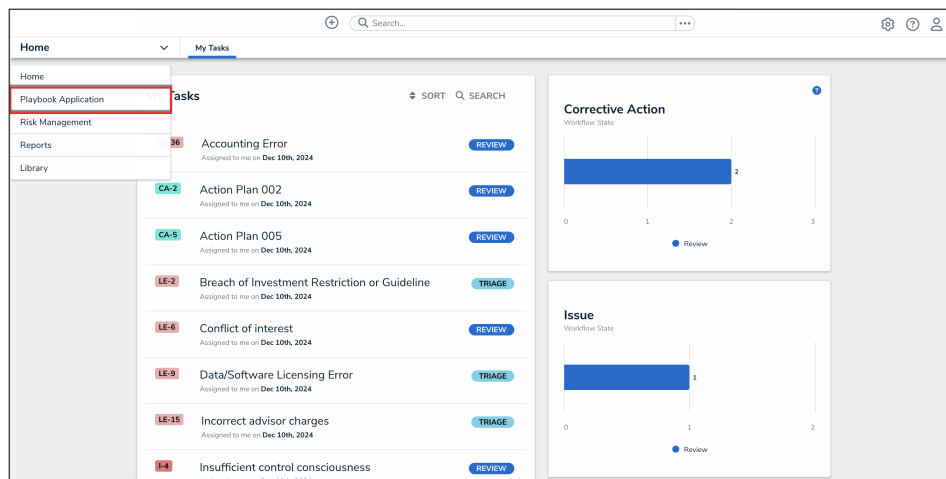
Navigation

1. From the **Home** screen, click the **Home** dropdown.



Home Dropdown

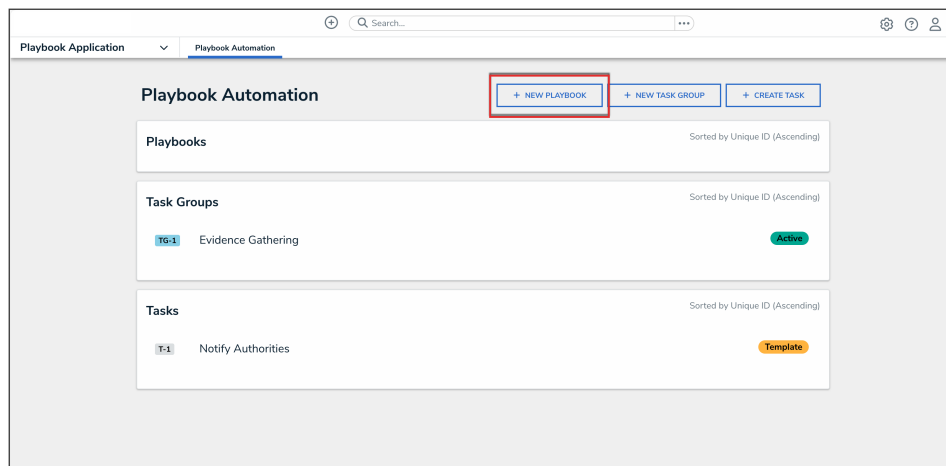
- From the **Home** dropdown, select the **Playbook Application** application.



Playbook Application

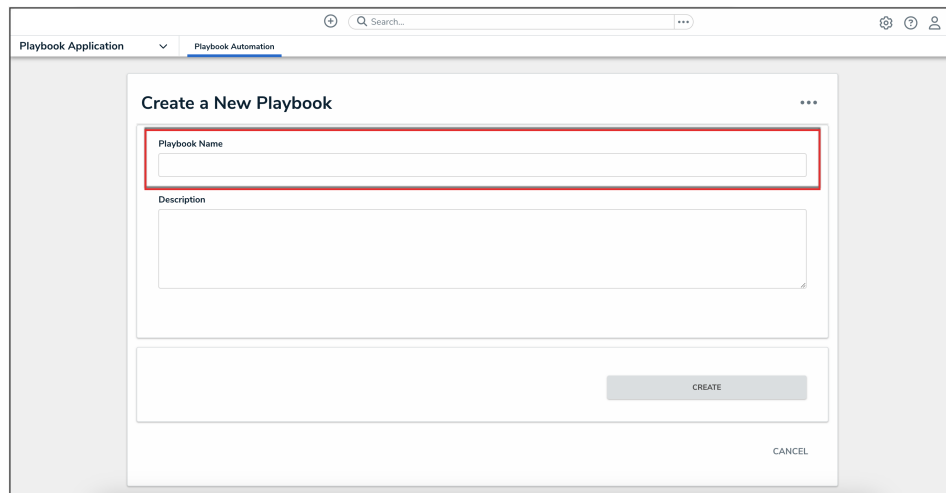
Adding a New Playbook

- From the **Playbook Automation** screen, click the **New Playbook** button.



New Playbook Button

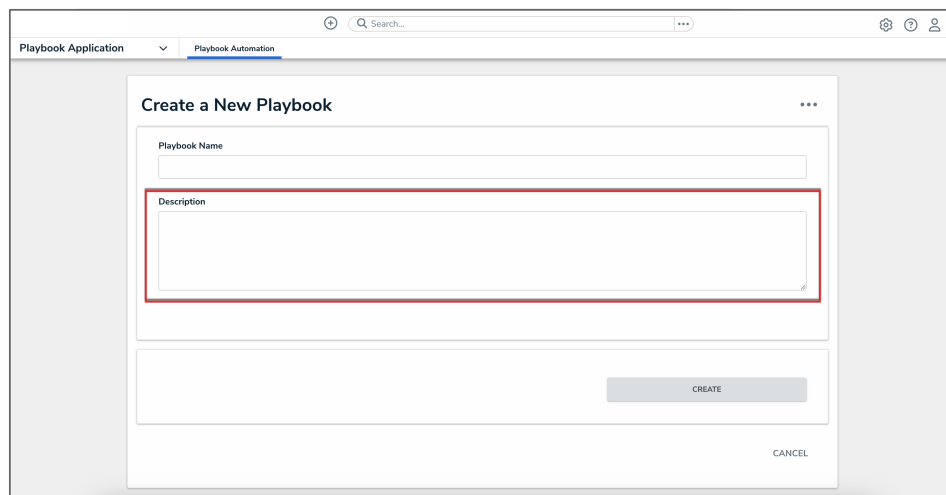
2. Enter a name for the playbook in the **Playbook Name** field.



The screenshot shows a web application interface for creating a new playbook. The title is "Create a New Playbook". There are two input fields: "Playbook Name" and "Description". The "Playbook Name" field is highlighted with a red border. Below the fields are "CREATE" and "CANCEL" buttons. The interface includes a search bar at the top and a sidebar with "Playbook Application" and "Playbook Automation" tabs.

Playbook Name Field

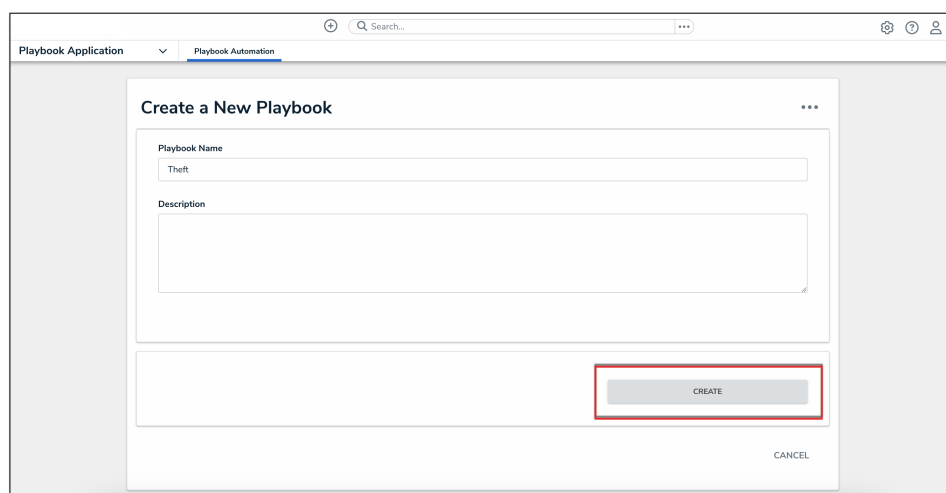
3. **(Optional):** Enter a description of the playbook in the **Description** field.



The screenshot shows the same "Create a New Playbook" form. In this step, the "Description" field is highlighted with a red border. The "Playbook Name" field is now empty. The "CREATE" and "CANCEL" buttons remain at the bottom.

Description Field

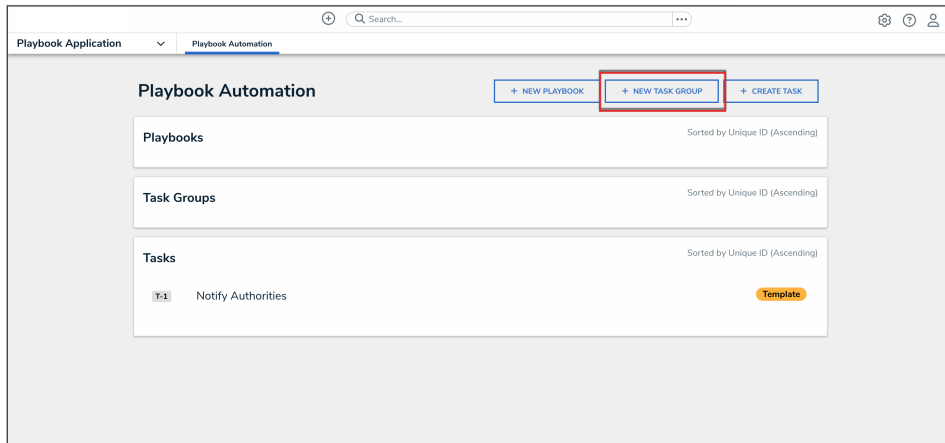
4. Click the **Create** button.



The screenshot shows the "Create a New Playbook" form. The "Playbook Name" field now contains the text "Theft". The "Description" field is empty. The "CREATE" button is highlighted with a red border. The "CANCEL" button is visible below it.

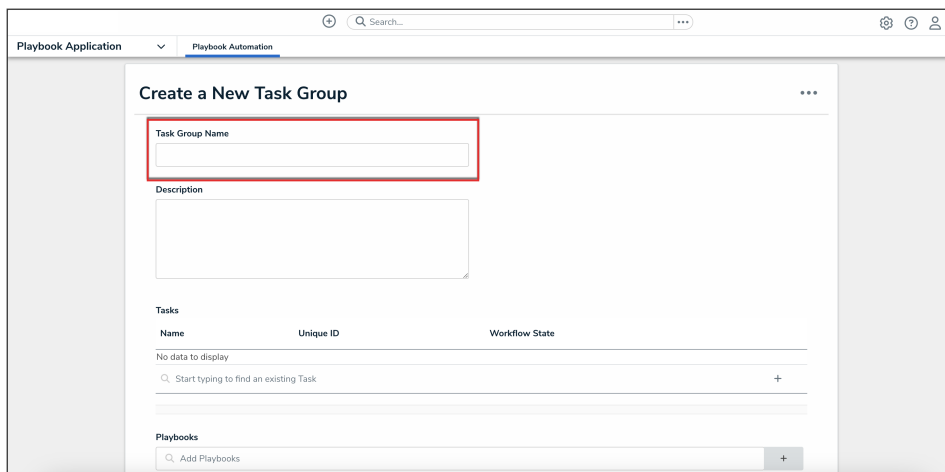
Adding a Playbook Task Group

1. From the **Playbook Automation** screen, click the **New Task Group** button.



New Task Group Button

2. Enter a name for the task group in the **Task Group Name** field.



Task Group Name Field

3. **(Optional):** Enter a description of the task group in the **Description** field.

Playbook Application ▾ Playbook Automation

Search...

Create a New Task Group

Task Group Name
Evidence Gathering

Description

Tasks

Name	Unique ID	Workflow State
No data to display		
Start typing to find an existing Task		

Playbooks

Add Playbooks

Description Field

- In the **Tasks** section, add tasks to the task group by searching for the task name. Click the **Create New** icon to create a new task to add to the task group.

Playbook Application ▾ Playbook Automation

Search...

Create a New Task Group

Task Group Name
Evidence Gathering

Description

Tasks

Name	Unique ID	Workflow State
No data to display		
Start typing to find an existing Task		

Playbooks

Add Playbooks

Task Section

- From the **Playbooks** drop-down, select the relevant playbooks you wish this task group to be added to. Click the **Create New** icon to create a new playbook to add the task group to.

Playbook Application ▾ Playbook Automation

Search...

Create a New Task Group

Task Group Name
Evidence Gathering

Description

Tasks

Name	Unique ID	Workflow State
Notify Authorities	T-1	Template
Start typing to find an existing Task		

Playbooks

Add Playbooks

CREATE

Playbooks Drop-down

6. Click the **Create** button.

The screenshot shows the 'Playbook Automation' form. The 'Task Group Name' field contains 'Evidence Gathering'. The 'Description' field is empty. The 'Tasks' section shows a table with columns 'Name', 'Unique ID', and 'Workflow State'. The first row is 'Notify Authorities', 'T-1', and 'Template'. Below the table is a search bar with the text 'Start typing to find an existing Task'. The 'Playbooks' section has a search bar with the text 'Theft'. The 'CREATE' button is highlighted with a red box at the bottom right.

Create Button

Creating a Templated Task

1. From the **Playbook Automation** screen, click the **Create Task** button.

The screenshot shows the 'Playbook Automation' screen. At the top, there are three buttons: '+ NEW PLAYBOOK', '+ NEW TASK GROUP', and '+ CREATE TASK'. The '+ CREATE TASK' button is highlighted with a red box. Below the buttons are three sections: 'Playbooks', 'Task Groups', and 'Tasks', each with a 'Sorted by Unique ID (Ascending)' label.

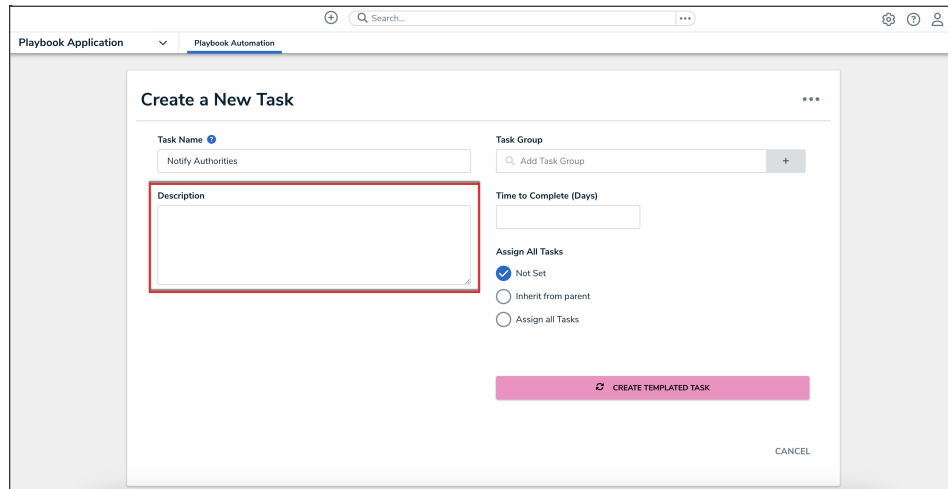
Create Task Button

2. Enter a name for the task in the **Task Name** field.

The screenshot shows the 'Create a New Task' modal form. The 'Task Name' field is highlighted with a red box. The 'Description' field is empty. The 'Task Group' section has a search bar with the text 'Add Task Group'. The 'Time to Complete (Days)' field is empty. The 'Assign All Tasks' section has three radio buttons: 'Not Set' (selected), 'Inherit from parent', and 'Assign all Tasks'. At the bottom, there is a pink button labeled 'CREATE TEMPLATED TASK' and a 'CANCEL' link.

Task Name Field

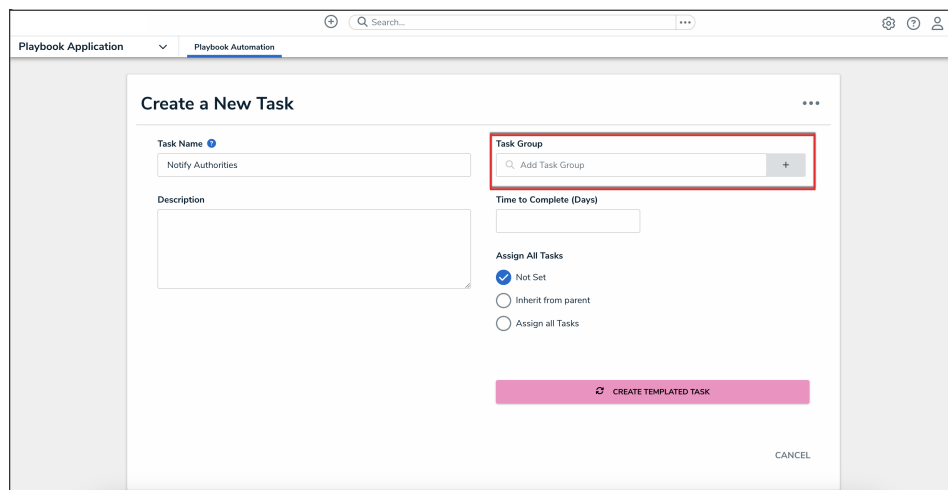
3. **(Optional):** Enter a description of the task in the **Description** field.



The screenshot shows the 'Create a New Task' form in the 'Playbook Automation' section. The form has several fields: 'Task Name' (with a dropdown menu showing 'Notify Authorities'), 'Task Group' (with a search bar and a '+' icon), 'Description' (a large text area, highlighted with a red border), 'Time to Complete (Days)' (a text input), and 'Assign All Tasks' (radio buttons for 'Not Set', 'Inherit from parent', and 'Assign all Tasks'). At the bottom, there is a pink button labeled 'CREATE TEMPLATED TASK' and a 'CANCEL' link.

Description Field

4. From the **Task Group** field, add the task to a task group by searching for the task group name. Click the **Create New** icon to create a new task group to add the task to.



The screenshot shows the 'Create a New Task' form in the 'Playbook Automation' section. The form has several fields: 'Task Name' (with a dropdown menu showing 'Notify Authorities'), 'Task Group' (with a search bar and a '+' icon, highlighted with a red border), 'Description' (a large text area), 'Time to Complete (Days)' (a text input), and 'Assign All Tasks' (radio buttons for 'Not Set', 'Inherit from parent', and 'Assign all Tasks'). At the bottom, there is a pink button labeled 'CREATE TEMPLATED TASK' and a 'CANCEL' link.

Task Group Field

5. In the **Time to Complete (Days)** field, enter the number of days required to complete a task. This field requires a specific number of days (e.g., 14 days) and auto-populates a due date.

Playbook Application ▾ Playbook Automation

Search...

Create a New Task

Task Name ⓘ
Notify Authorities

Description

Task Group
Add Task Group +

Time to Complete (Days)

Assign All Tasks
☒ Not Set
☐ Inherit from parent
☐ Assign all Tasks

CREATE TEMPLATED TASK

CANCEL

Time to Complete (Days) Field

6. In the **Assign All Tasks** section, select one of the following:
- **Not set:** With this option, no users are assigned to generated Tasks.
 - **Inherit from parent:** This option inherits user task assignments from the parent object that the tasks are being generated on (applied on). For example, all tasks generated could be auto-assigned to the Incident Owner user linked to the incident that the tasks are being generated on. To pick a role to pull task assignments from for this logic, selections are made when defining the Playbook Automation Rule: **Inherit Assignee (Applied Object Type)** drop-down.
 - **Assign all tasks:** This option can be used to assign each task out individually to a specific user or user group from the same Org/different team.

Playbook Application ▾ Playbook Automation

Search...

Create a New Task

Task Name ⓘ
Notify Authorities

Description

Task Group
Add Task Group +

Time to Complete (Days)

Assign All Tasks
☒ Not Set
☐ Inherit from parent
☐ Assign all Tasks

CREATE TEMPLATED TASK

CANCEL

Time to Complete (Days) Field

7. Click the **Create Templated Task** button.

Playbook Application

Playbook Automation

Search...

Settings

Help

User

Create a New Task

Task Name

Notify Authorities

Task Group

Add Task Group

Description

Time to Complete (Days)

Assign All Tasks

☒ Not Set

☐ Inherit from parent

☐ Assign all Tasks

CREATE TEMPLATED TASK

CANCEL

Create Templated Task Button