

Configuring the Driver Object Type Form for Playbooks Automation

Last Modified on 02/13/2025 10:01 am EST

Overview

When a user creates a Playbook Automation rule, they must select an object type that will drive the logic of the automation. Additional configuration of the driver object type form is required to ensure it is ready to be used with playbooks.

User Account Requirements

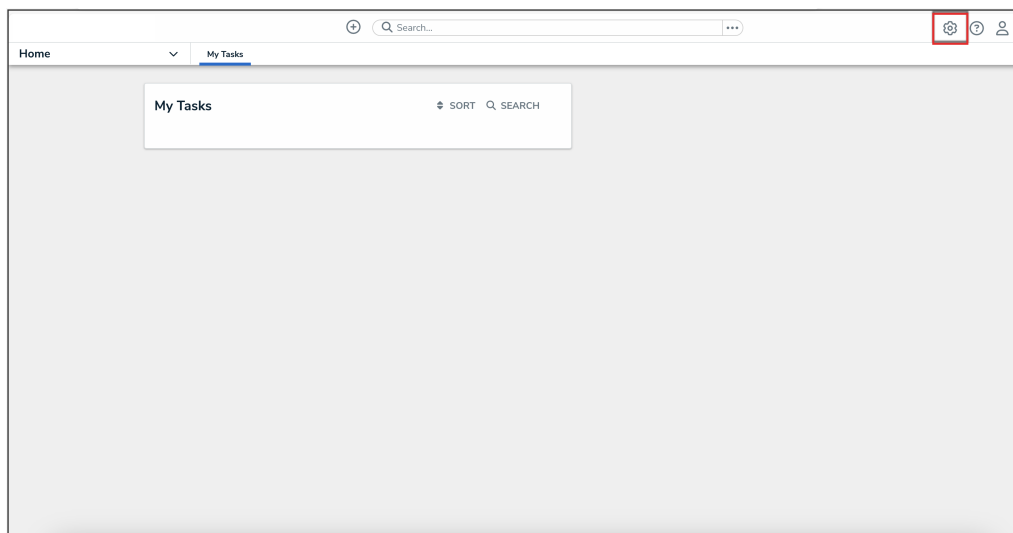
The user account you use to log into Resolver must be an Administrator to edit forms.

Related Information/Setup

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

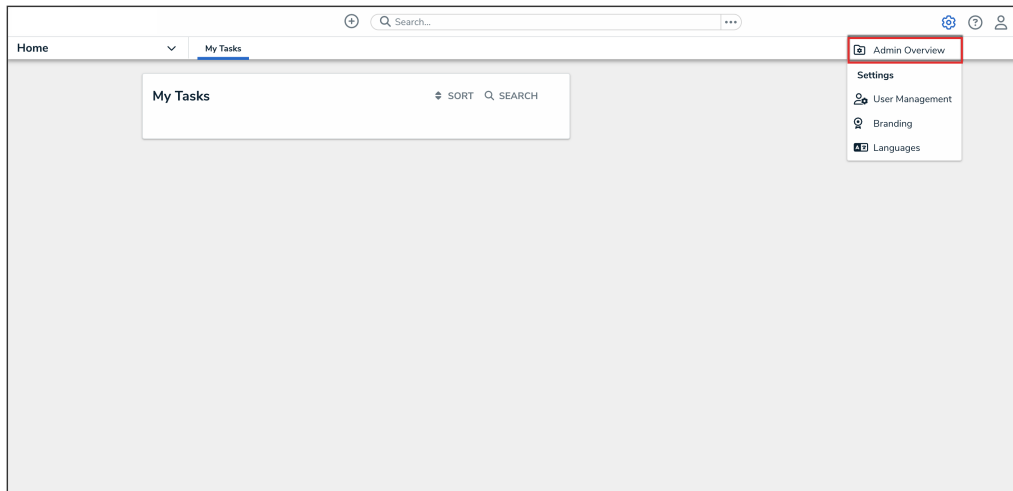
Navigation

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



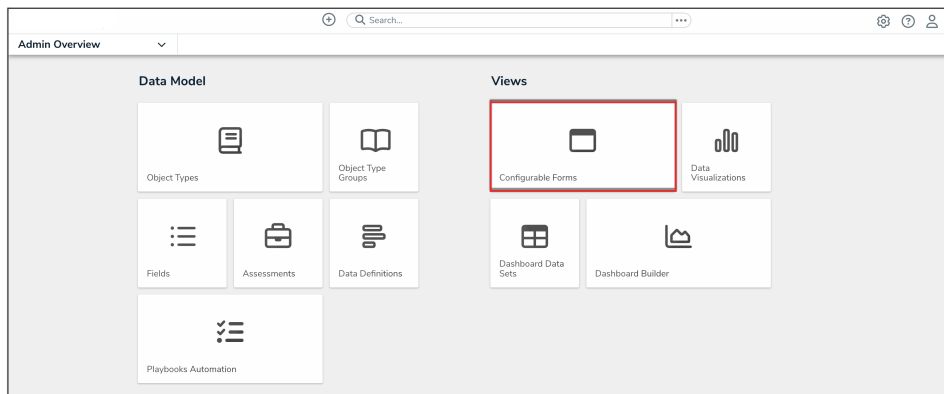
Administration Icon

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



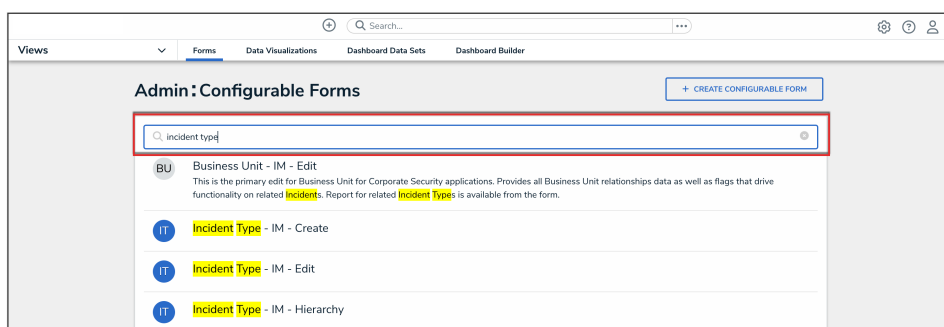
Administrator Settings Menu

- From the **Admin Overview** screen, click the **Configurable Forms** tile under the **Views** section.



Configurable Forms Tile

- From the **Configurable Forms** screen, enter a form name for the driver object type you selected for the Playbook Automation rule in the **Search** field.



Search Field

- Click the form that you want to edit.

Configuring the Driver Object Type Form

1. From the **Relationships** section in the **Form Elements** panel, drag and drop the **Auto-Generate Playbooks** relationship to an existing or new section on the form.

The screenshot shows the 'Admin: Edit Configurable Form' interface. The 'Form Elements' panel is open on the right, and the 'Relationships' section is selected. The 'Auto-Generate Playbooks on Incident' relationship is highlighted with a red box. The main form area shows the 'Incident Type - IM - Edit' form with a 'Form Layout' section containing three options: '1 COLUMN', 'LEFT SIDEBAR', and 'RIGHT SIDEBAR'. The 'Object Name' field is visible at the bottom.

Auto-Generate Playbooks Relationship

2. From the **Relationships** section in the **Form Elements** panel, drag and drop the **Suggest Playbooks** relationship to an existing or new section on the form.

The screenshot shows the 'Admin: Edit Configurable Form' interface. The 'Form Elements' panel is open on the right, and the 'Relationships' section is selected. The 'Suggest Playbooks on Incident' relationship is highlighted with a red box. The main form area shows the 'Incident Type - IM - Edit' form with a 'Form Layout' section containing three options: '1 COLUMN', 'LEFT SIDEBAR', and 'RIGHT SIDEBAR'. The 'Object Name' field is visible at the bottom.

Suggest Playbooks Relationship

3. Click the **Done** button to save your changes.

The screenshot shows the 'Admin: Edit Configurable Form' interface. The 'Form Elements' panel is open on the right, and the 'Relationships' section is selected. The 'Suggest Playbooks on Incident' relationship is highlighted with a red box. The main form area shows the 'Incident Type - IM - Edit' form with a 'Form Layout' section containing three options: '1 COLUMN', 'LEFT SIDEBAR', and 'RIGHT SIDEBAR'. The 'Object Name' field is visible at the bottom. The 'Done' button is highlighted with a red box.

Done Button