

# Creating a Playbook Automation Rule

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## 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

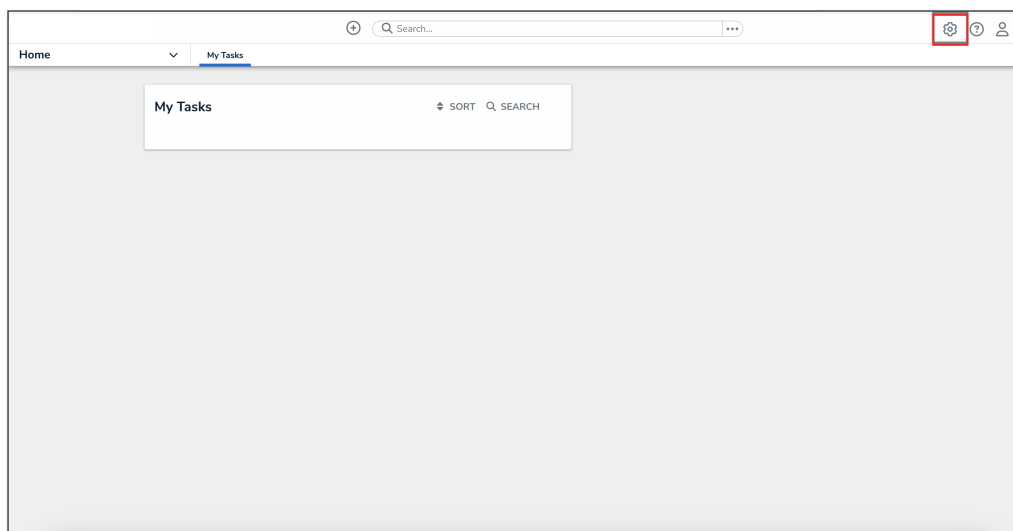
The user account you use to log into Resolver must be an Administrator to create a Playbook Automation Rule.

## Related Information/Setup

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

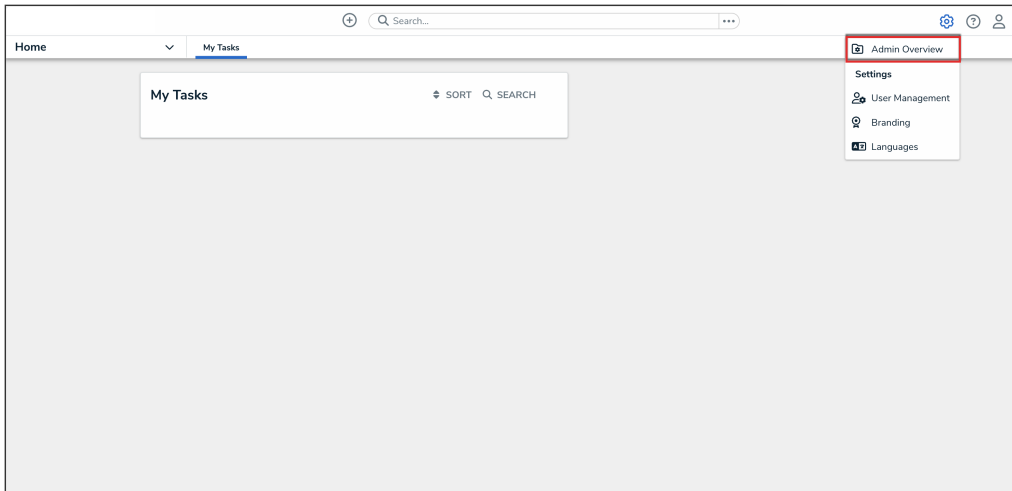
## Navigation

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



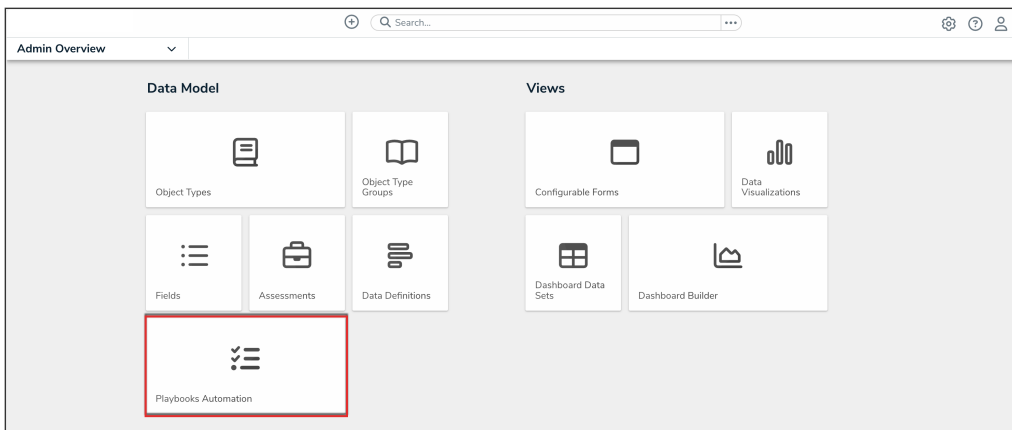
*Administration Icon*

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



*Administrator Settings Menu*

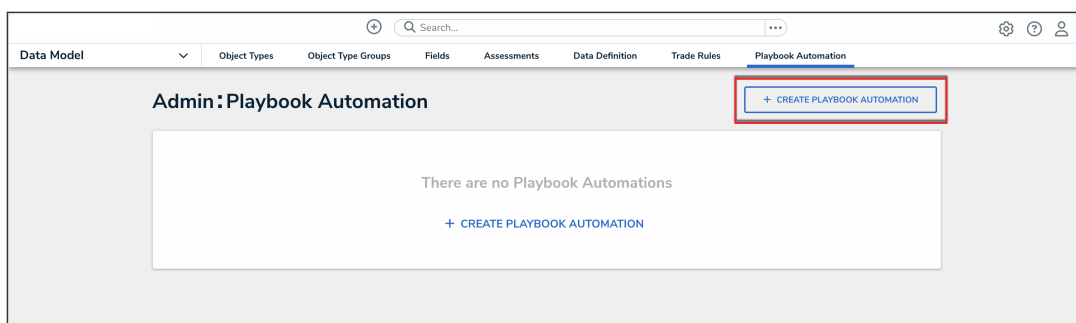
- From the **Admin Overview** screen, click the **Playbooks Automation** tile under the **Data Model** section.



*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 a web application. The form has a header with navigation tabs: 'Data Model', 'Object Types', 'Object Type Groups', 'Fields', 'Assessments', 'Data Definition', 'Trade Rules', and 'Playbook Automation'. Below the header, the form contains three main sections: a text input field for '\* Name', a larger 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. The '\* Name' field is now filled with text. The 'Description' field 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. The '\* Name' and 'Description' fields are filled. 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' configuration page. The 'Applied Object Type' dropdown is highlighted with a red box. The form includes the following fields:

- \* Name:** Task Templating
- Description:** (empty text area)
- \* Template Object Type:** Task
- \* Applied Object Type:** (highlighted with a red box, currently showing 'Select one...')
- \* Driver Object Type(s):** (currently showing 'Select one...')

*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' configuration page. The 'Driver Object Type(s)' dropdown is highlighted with a red box. The form includes the following fields:

- \* Name:** Task Templating
- Description:** (empty text area)
- \* Template Object Type:** Task
- \* Applied Object Type:** Incident
- \* Driver Object Type(s):** (highlighted with a red box, currently showing 'Select one...')

*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.

Field Name	Field Type	Data 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

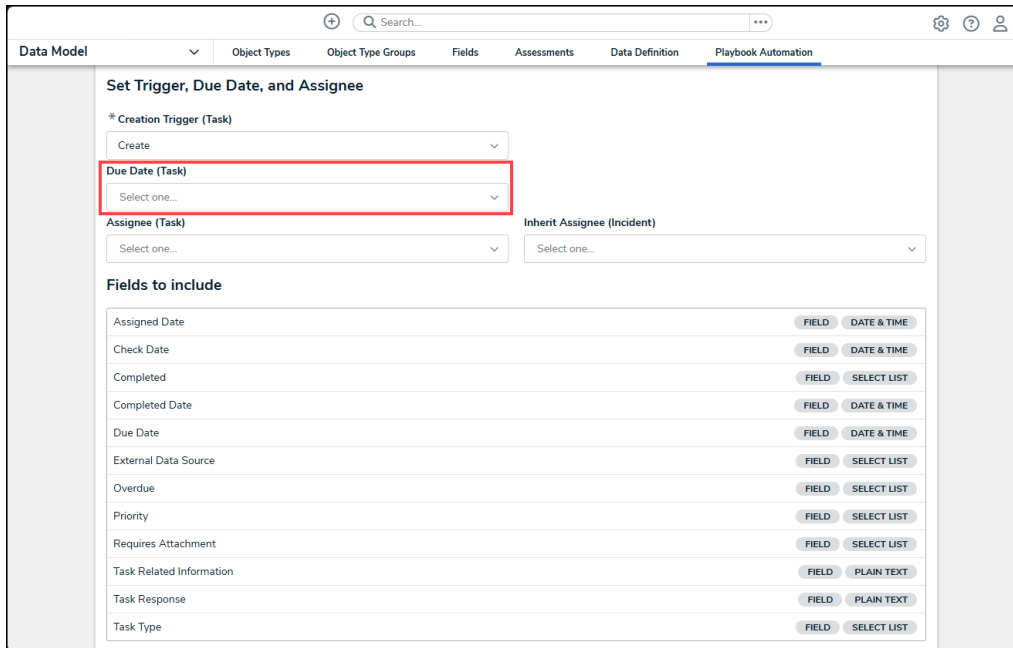
*Creation Trigger Drop-down Menu*

- (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:**

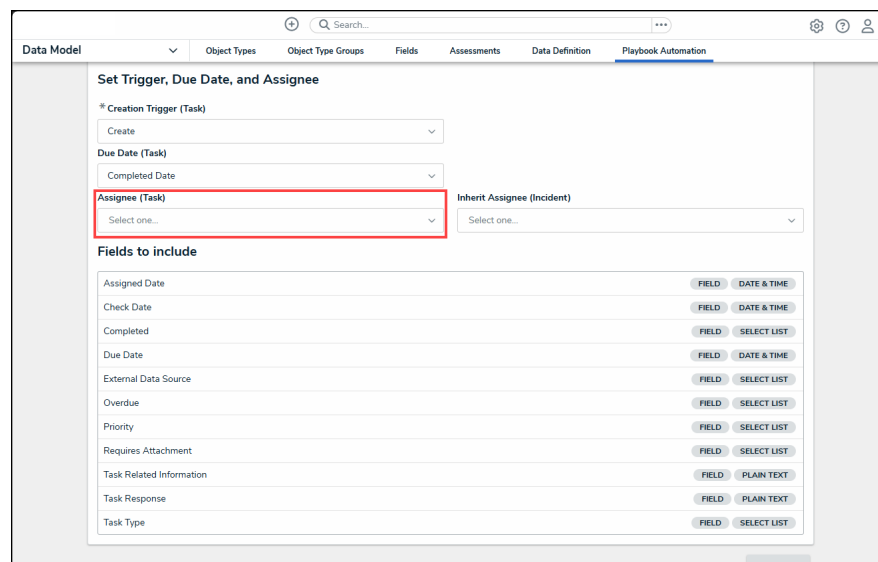
Details within each Task template can be used to optionally specify the 'number of days' to be used to calculate the **Due Date** on tasks generated.



*Due Date Drop-down*

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

- a. 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.



*Assignee (Task) Drop-down*

- 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.

The screenshot shows the 'Set Trigger, Due Date, and Assignee' configuration screen. It includes sections for 'Creation Trigger (Task)', 'Due Date (Task)', 'Assignee (Task)', and 'Fields to include'. The 'Inherit Assignee (Incident)' dropdown menu is highlighted with a red box.

*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 configuration interface for a Playbook Automation rule. The main section is titled "Set Trigger, Due Date, and Assignee". It includes several dropdown menus: "Creation Trigger (Task)" set to "Create", "Due Date (Task)" set to "Completed Date", "Assignee (Task)" set to "Task Assigned To", and "Inherit Assignee (Incident)" set to "Incident Owner". Below these is a section titled "Fields to include" which is highlighted with a red border. This section lists various fields with their corresponding data types: 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), and Task Type (SELECT LIST). At the bottom right, there are "CANCEL" and "CREATE" buttons.

*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.

This screenshot shows the same configuration interface as the previous one, but with the "Set Due Date & Assignment" section visible. The "Due Date (Task)" dropdown is set to "Select one...", "Assignee (Task)" is "Task Assigned To", and "Inherit Assignee (Incident)" is "Incident Owner". The "Fields to include" section is also visible. At the bottom right, the "CREATE" button is highlighted with a red border, indicating it is the next step in the process.

*Create Button*

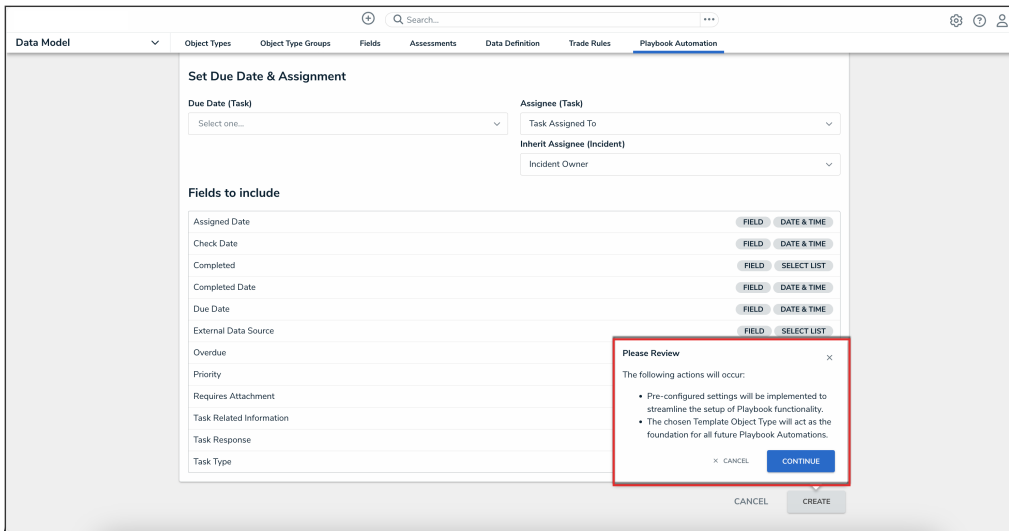
- Review the confirmation pop-up and click the **Continue** button to create the Playbook





**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.)

