

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

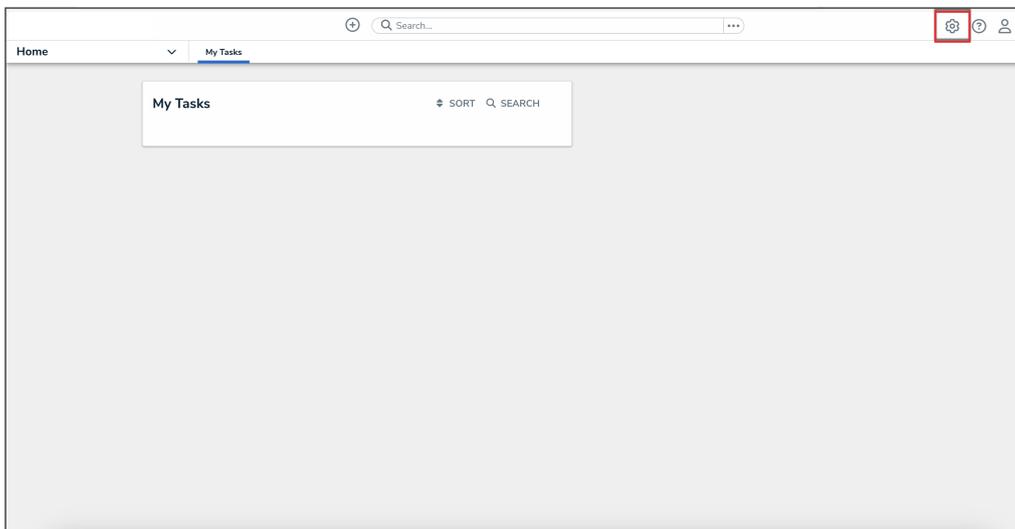
The user account you use to log into Resolver must be an Administrator to create a Playbook Automation Rule.

Related Information/Setup

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

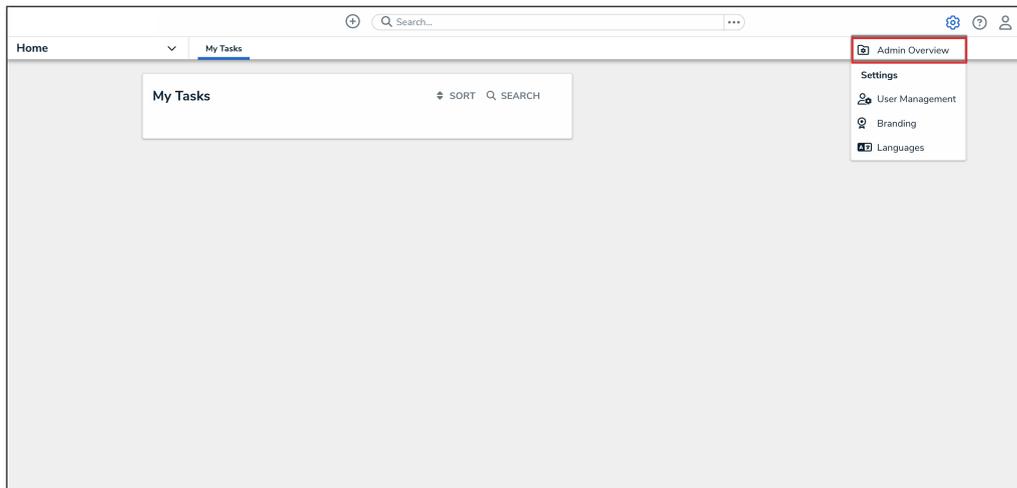
Navigation

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



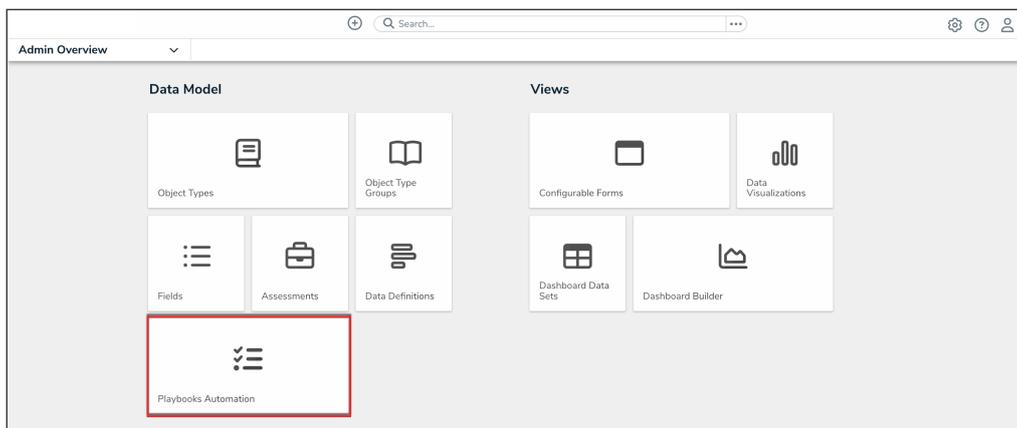
Administration Icon

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



Administrator Settings Menu

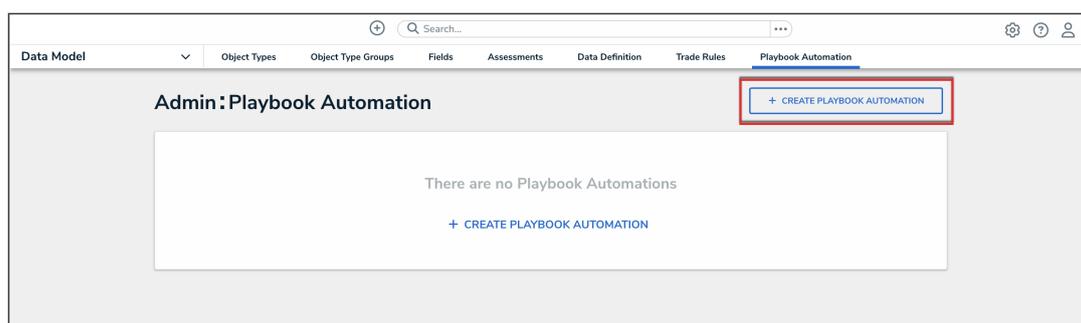
- From the **Admin Overview** screen, click the **Playbooks Automation** tile under the **Data Model** section.



Playbooks Automation Tile

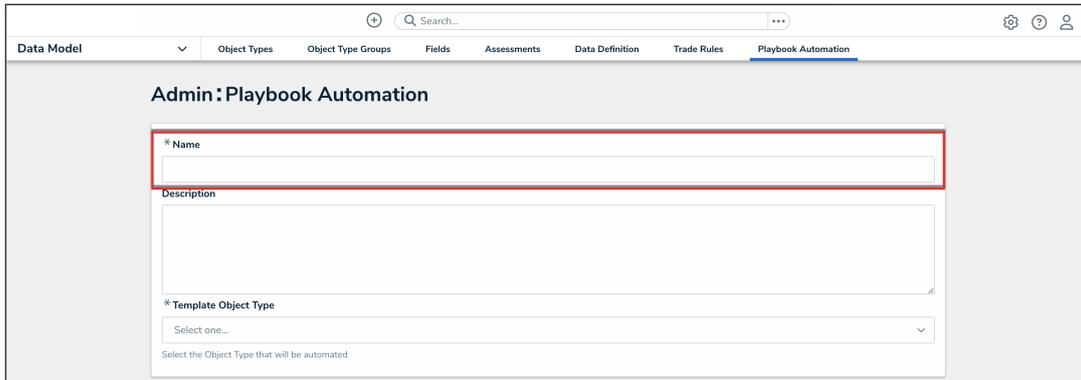
Creating a Playbook Automation

- Click the **Create Playbook Automation** button.



Create Playbook Automation Button

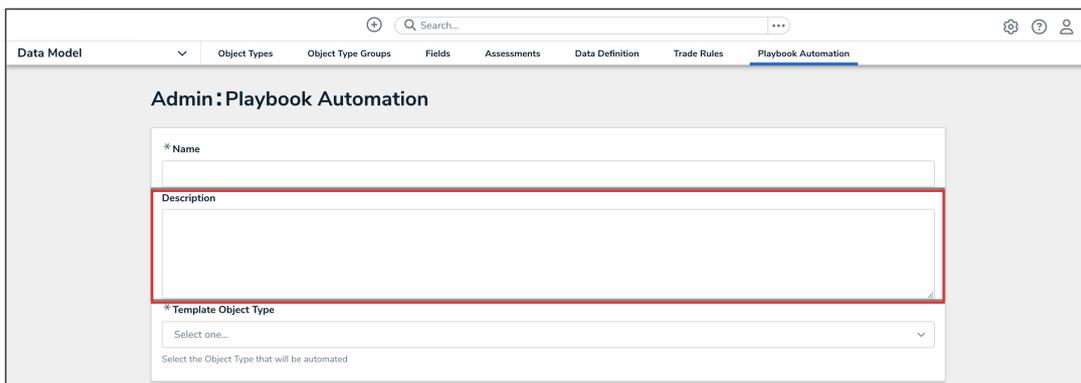
2. Enter a name for the Playbook Automation in the **Name** field.



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

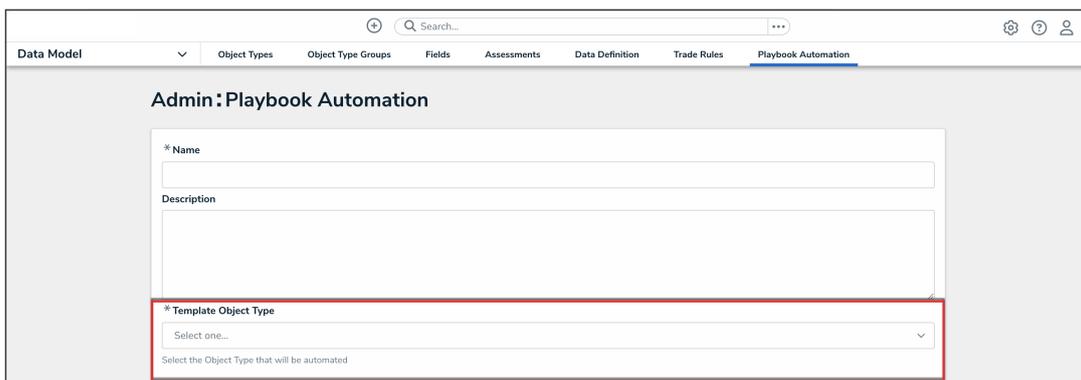
3. **(Optional)** Enter a description of the Playbook Automation in **Description** field.



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 menu is highlighted with a red border. The dropdown currently shows 'Task' selected. Below it, the text reads 'Select where the automation will be applied to'. To the right, the 'Driver Object Type(s)' dropdown is also visible, with the text 'Select what the automation will be based on' below it.

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 menu is highlighted with a red border. The dropdown currently shows 'Select one...' as the selected option. Below it, the text reads 'Select what the automation will be based on'. To the left, the 'Applied Object Type' dropdown is visible, with 'Incident' selected and the text 'Select where the automation will be applied to' below it.

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
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

8. **(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.

Field Name	Field 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

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.

Field Name	Field Type
Assigned Date	FIELD DATE & TIME
Check Date	FIELD DATE & TIME
Completed	FIELD SELECT LIST
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

Assignee (Task) Drop-down



Note:

If the **Assignee** field has **Task Assigned To** selected, the **Inherit Assignee** field must also be selected.

- 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)', and 'Assignee (Task)'. The 'Assignee (Task)' section has a dropdown menu for 'Task Assigned To' and a red-bordered dropdown menu for 'Inherit Assignee (Incident)'. Below these are 'Fields to include' with various task attributes and their corresponding field types.

Field Name	Field Type
Assigned Date	FIELD DATE & TIME
Check Date	FIELD DATE & TIME
Completed	FIELD SELECT LIST
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

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 'Set Trigger, Due Date, and Assignee' configuration screen. It includes dropdown menus for 'Creation Trigger (Task)' (Create), 'Due Date (Task)' (Completed Date), 'Assignee (Task)' (Task Assigned To), and 'Inherit Assignee (Incident)' (Incident Owner). Below these is a 'Fields to include' section with a red border, listing various fields and their types: Assigned Date (FIELD, DATE & TIME), Check Date (FIELD, DATE & TIME), Completed (FIELD, SELECT LIST), 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), and Task Type (FIELD, 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.

The screenshot shows the 'Set Due Date & Assignment' configuration screen. It includes dropdown menus for 'Due Date (Task)' (Select one...), 'Assignee (Task)' (Task Assigned To), and 'Inherit Assignee (Incident)' (Incident Owner). Below these is a 'Fields to include' section with the same list of fields and types as in the previous screenshot. At the bottom right, there are 'CANCEL' and 'CREATE' buttons, with the 'CREATE' button highlighted by a red border.

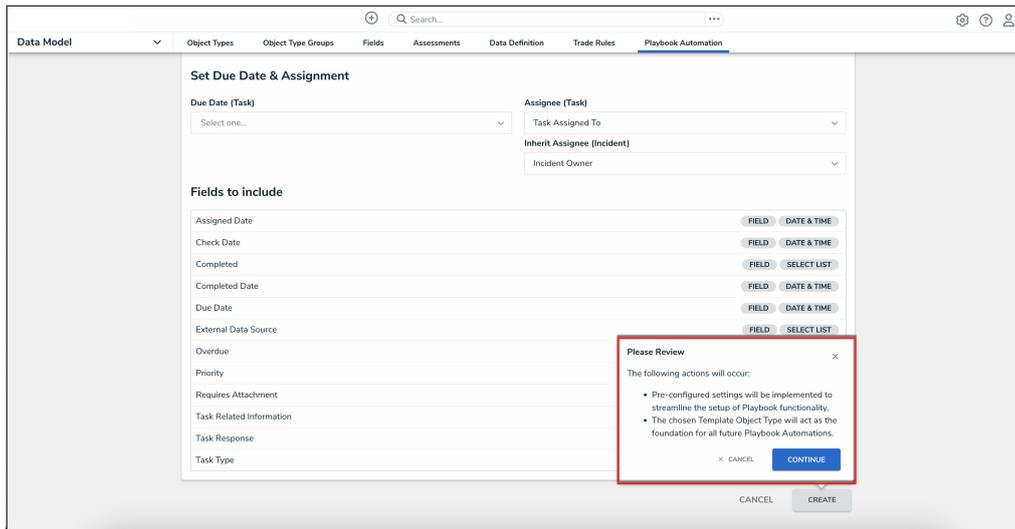
Create Button

- 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.)

