

Playbooks Automation Overview

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Overview



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.

The **Playbooks Automation** feature will allow users to automate playbooks and standard operating procedures (SOPs) within existing processes efficiently running programs, such as Incident Response plans, on their Orgs.

Playbooks Automation works through:

- **Task auto-generation:** Users will establish a comprehensive library of playbooks and SOPs in their Orgs and use this knowledge base to automate task-generation on an existing process.
- **Playbook auto-suggestion:** The feature also offers playbook suggestions, providing guidance to efficiently resolve the issue on hand.
- **Task templating:** Tasks are generated based on a task template from the Playbook Library that holds logic for due date calculations, task user assignments, work instructions, and default field values to help complete a task.
- **Configuration auto-generation:** To help users self-enable this feature, the platform will auto-generate most of the configuration required for implementing **Playbooks Automation** within an existing Org. Key configuration will be managed by the system, to keep the automation functioning optimally. For more information, please read the [System-managed Configuration](#) article.

To begin using **Playbooks Automation**, users will need to configure the key components of the feature, including:

- The **Playbook Automation** rule
- A new **Run Playbook Automation** workflow action
- A new **Apply Playbooks** form action