

# Add a Run Playbook Automation Action to a Transition

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## Overview

The **Run Playbook Automation** action allows Administrators to automate task generation through workflow actions when a playbook is created.

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 have Administrator permission to use the Playbook Automation feature.

### **Related Information/Setup**

Please refer to the Playbooks Automation section for more information on using the Playbook Automation feature.

## Navigation

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

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Home	V My Tasks				
	My Tasks	¢	SORT Q SEARCH		



#### Administration Icon

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

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Home	✓ My Tasks			Admin Overview	
				Settings	
	My Tasks	\$ SORT Q SEARCH		2 User Management	
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Administrator Settings Menu

3. From the *Admin Overview* screen, click the **Object Types** tile under the **Data Model** section.

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Admin Overview V	Data Model		Views		
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	ž				
	Playbooks Automation				
	Data Access		Application Management		
	User Groups Roles		Org Manager Applications	Deployment	

Object Types Tile

 From the *Object Types* screen, enter an object type name in the **Search** field to narrow down the object types list.

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Data Model	V Object Types Object Type Groups Fields Assessments Data Definition Playbook Automation	
	Admin:Object Types + CREATE OBJECT TYPE	
	Q, Search	
	Activity	
	Artivity Type	
	Alert     Alerts inform compliance teams when new or proposed regulatory changes are	



#### Search Field

- 4. Click the object type that you want to edit.
- 5. From the *Edit Object Type* screen, click a workflow under the **Workflow** tab.

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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition	Playbook Automation		
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	Inciden	ıt						1	
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ſ	Workflo	w Concat	enations						
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Workflow Tab

6. If there are no workflows listed, click the **Configure Workflow** button.

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Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition	Playbook Automation		
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	Workfl	ow Concat	enations						
	Wor	kflow Configure Workfi	ow						

Configure Workflow Button

## Add a Run Playbook Automation Action to a Transition

1. From the *Edit Workflow* screen, click the trigger that you want to add the Run Playbook Automation action to.



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		Create from Activity	# Transition	s to Triage					
		Save As Draft ≓ T	ansitions to Dra	aft					
		Submit to Resolver	Transitions	to Triage					
		Submit from Email	₽ Transitions t	o Triage					
		Create as Incident	Transitions b	· Open					
	_	Create # Transitions	to Open						
		Submit # Transition	to Triage						

Workflow Trigger



2. From the **Edit Trigger** pop-up, click the **Configure** icon under **Transitions**.

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			Create from Activity	≓ Transition	ns to Triage					
			Save As Draft 🛛 🛱 Tr	ansitions to D	raft					
			Submit to Resolver	₽ Transition	to Triage					

Configure Icon

3. Click the **Add Action** button under **Actions**.



			•	Q Search				\$ © \$
Data Model	✓ Object	Types Object Type Groups	Fields	Assessments	Data Definition	Trade Rules	Playbook Automation	
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		Save As Draft ≓	iransitions to <b>C</b>	Draft			Set Creator	ø ×
		Submit to Resolver	7 Transition	ns to Triage			Reported Date	e ×
		Submit from Email	2 Transition	s to Triage			Created	e ×
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		Create # Transition	s to Open				+ ADD ACTION	
		Submit 2 Transitio	is to Triage			-		V DONE
		Save as Triage 2	Transitions to	Triage				

Add Action Button

4. Select **Run Playbook Automation** from the **Type** dropdown menu.



Type Dropdown Menu

5. Type a name for the action in the **Name** field.

		···
Data Model	Object Types Object Type Groups Fields Assessments	Data Definition Trade Rules Playbook Automation
	Incident Status	EDIT TRIGGER ×
		Bypass Required Fields. •
	States	CONDITIONS
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	TRIGGERS + ADD TRIGGER Create from Activity #2 Transitions to Triage	ACTIONS
	Save As Draft 2 Transitions to Draft	Type Run Playbook Automation  V
	Submit to Resolver 2 Transitions to Triage	Name
	Submit from Email 🛛 🤯 Transitions to Triage	Auto-generate Tasks From Select one
	Create as Incident 🛛 🔁 Transitions to Open	Auto-suggest Playbooks From Select one
	Create 🤃 Transitions to Open	CANCEL V CREATE
	Submit 🔁 Transitions to Triage	



#### Name Field

6. From the **Auto-Generate Tasks From** dropdown, select a driver object type.

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Data Model	V Object Types Object Type Groups Fields Assessments	Data Definition Trade Rules Playbook Automation				
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	Save As Draft Z Transitions to Draft	Auto-generate Tasks From				
	Submit to Resolver 2 Transitions to Triage	Select one				
	Submit from Email #2 Transitions to Triage	Select one V				
	Create as Incident 2 Transitions to Open	, CANCEL V CREATE				

Auto-Generate Tasks From Dropdown Menu

7. From the **Auto-Suggest Playbooks From** dropdown, select a driver object type.

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Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition Trade Rules Playbook Automation				
	Admin:Edit Workflow	EDIT TRIGGER ×				
	Incident Status	× Bypass Required Fields.				
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	CREATION	ACTIONS Type Run Playbook Automation ~				
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	Save As Draft # Transitions to Draft	Incident Task Automation Auto-generate Tasks From				
	Submit to Resolver 2 Transitions to Triage	Incident Type × · · · · · · · · · · · · · · · · · ·				
	Submit from Email 🗱 Transitions to Triage	Selectione V				
	Create as Incident 😤 Transitions to Open	CANCEL 🗸 CREATE				

Auto-Suggest Playbooks From Dropdown Menu

8. Click the **Create** button.



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	Admin: Edit Workflow	EDIT TRIGGER ×
	Incident Status	X Bypass Required Fields.
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	States	+ ADD CONDITION
	CREATION	ACTIONS
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	Create from Activity 🛛 🛱 Transitions to Triage	Name
	Save As Draft 2 Transitions to Draft	Incident Task Automation Auto-generate Tasks From
	Submit to Resolver 2 Transitions to Triage	Incident Type × · · · ·
	Submit from Email 🛛 🕫 Transitions to Triage	Auto-suggest Flaybooks From
	Create as Incident 2 Transitions to Open	CANCEL

Create Button

9. From the **Edit Trigger** pop-up, click the **Done** button to save your changes.

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Data Model 🗸 🗸 🗸	Object Types Object Type Groups Fields Assessments	Data Definition Trade Rules Playbook Automation	
State	2S	EDIT TRIGGER	×
•		ACTIONS	
	Create from Activity # Transitions to Triage	Notify Triage	₽ ×
	Save As Draft 72 Transitions to Draft	Set Creator	/ ×
	Submit to Resolver # Transitions to Triage	Reported Date	×
	Submit from Email 72 Transitions to Triage	Created	/ ×
	Create as Incident 🛛 🛱 Transitions to Open	Set Source	/ ×
	Create 2 Transitions to Open	Incident Task Automation	/ ×
	Submit 🛱 Transitions to Triage	+ ADD ACTION	
	Save as Triage 2 Transitions to Triage		V DONE

Done Button