

# Playbooks Automation Quick Start Guide

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## Overview

Before using Playbooks Automation, it is recommended that users carefully read through the following information. The information presented below is laid out in order, as some elements of Playbooks Automation must first be created before you can use Playbooks in your Org.

For more information about Playbooks Automation, please read the [Playbooks Automation Overview](#) article.



**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 assigned to the Playbook Manager role or have permission to use Playbooks Automation, and must have the Administrator permission to access the **Admin Overview** screen.

## Playbooks Automation Configuration

1. The first step to using Playbooks Automation is to [create a Playbook Automation rule](#).

Once the Playbook Automation rule is created, to help users self-enable this feature, the platform will auto-generate most of the configuration required for implementing Playbooks Automation within the Org. Key configuration will be managed by the system, to keep the automation functioning optimally.

The following list will be automatically applied to your Org:

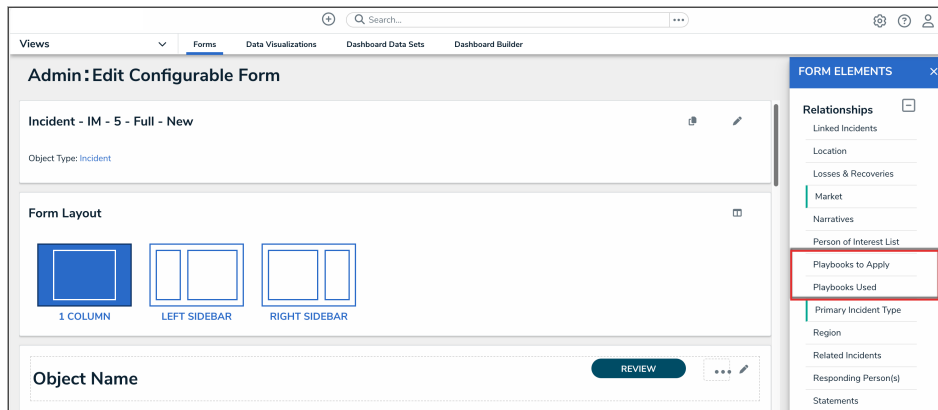
- The **Playbook Application** will appear in the list of applications.
- The user who creates the Playbook Automation rule will be assigned to the newly created **Playbook Manager** role.
- New **Playbook** and **Task Group** object types, forms, workflows, and data definitions will be created.
- A new workflow state called **Template** and workflow trigger called **Create Templated Task** will be created for the templated object type.
- The following elements need to be manually added on existing configurable forms

and workflow processes on for the driver object type (the object type that determines the logic of the Playbook Automation rule) and the applied object type (the object type that the Playbook Automation rule was applied to):

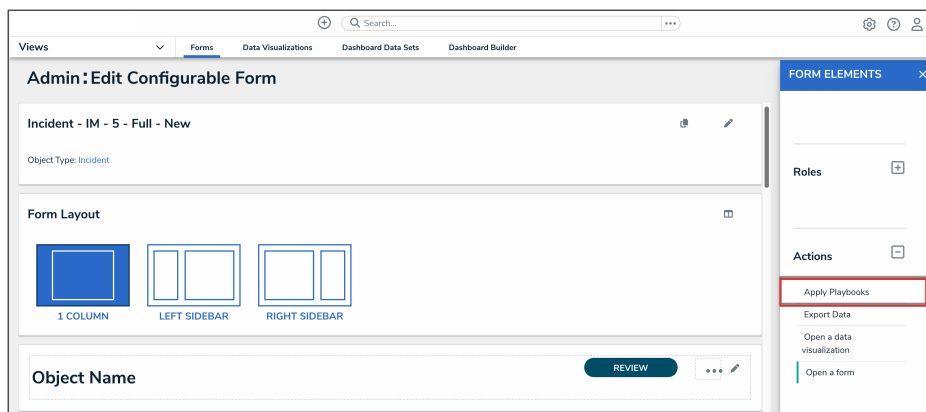
- **Auto-Generate Playbooks** relationship
- **Suggest Playbooks** relationship
- **Playbooks to Apply** relationship
- **Playbook Used** relationship
- **Apply Playbooks** form action
- **Run Playbook Automation** workflow action

To complete the implementation, some existing user flows will require further configuration, as outlined in the next steps in this article.

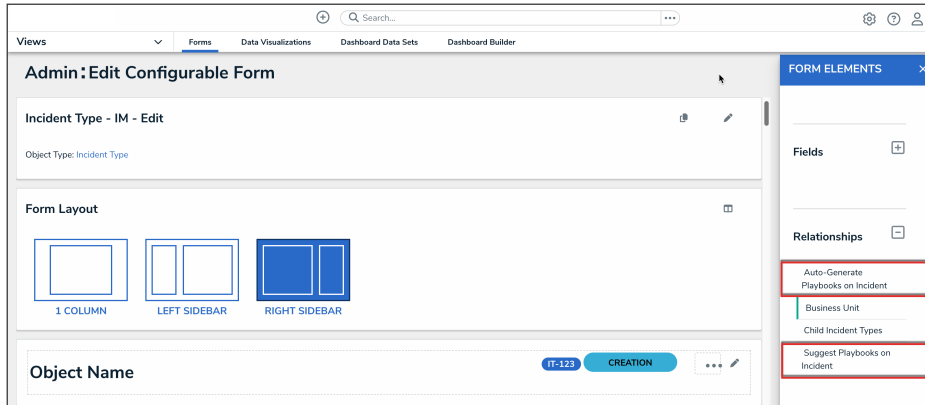
2. Configure the Playbook Automation workflow action by [adding a Run Playbook Automation action to a transition](#).
3. [Configure the applied object type form](#) by following these steps:
  - a. Open the form for the applied object type selected in step 1.
  - b. Drag and drop the **Playbooks to Apply** relationship to an existing or new section on the form.
  - c. Drag and drop the **Playbooks Used** relationship to an existing or new section on the form.



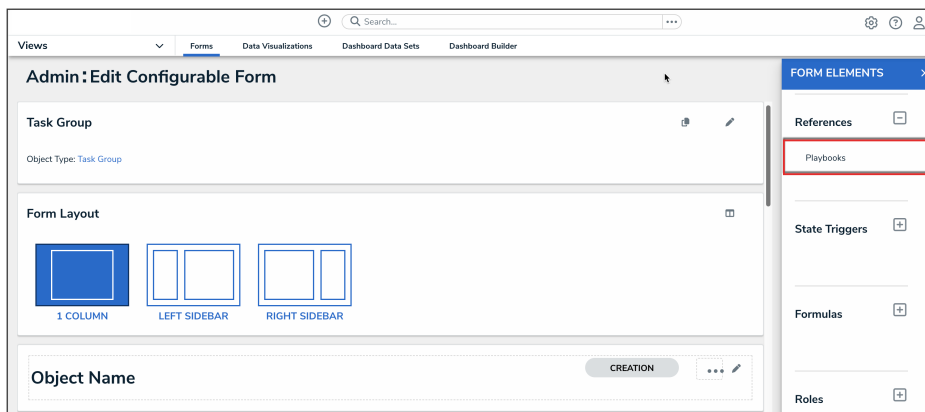
- d. Drag and drop the **Apply Playbooks** action as a button that kicks off the automation.



4. **Configure the driver object type form** by following these steps:
  - a. Open the form for the driver object type selected in step 1.
  - b. Drag and drop the **Auto-Generate Playbooks** relationship to an existing or new section on the form.
  - c. Drag and drop the **Suggest Playbooks** relationship to an existing or new section on the form.



5. **Configure the Task Group form** by following these steps:
  - a. Open the **Task Group** form.
  - b. Drag and drop the **Playbooks** reference to an existing or new section on the form.



**Note:** **Step 5: Configure the Task Group form** is currently a manual step. However, this will be included as part of the configuration that will be automatically applied to your Org in an upcoming release.

## Create Playbook Library Content



**Note:**

The user account you use to log into Resolver must be assigned to the Playbook Manager role to complete the following steps.

1. Load data into the Playbook library.

Content for the Playbook library can be set up in bulk or manually. Users can:

- a. Manually set up the Playbook library objects such as playbooks, task groups, tasks.
- b. Set up Playbook library content in bulk, using data import. When using this feature, select the **Template** workflow state on the template objects that are to be imported.



**Note:**

Using data import is recommended for a quick implementation.

To create Playbook objects manually, follow the instructions in the [Setting Up Playbook Library Content](#) article.

2. Link Playbook library content to driver categories.

From the driver objects, click the **Add Existing** button on the **Auto-Generate Playbooks** or **Suggest Playbooks** relationships to search and link the content you created to each driver category. These links will then be used to suggest or auto-execute action plans from the Playbooks when the automation actions are run.