

# **Setting Up Playbook Library Content**

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# Overview

To begin using **Playbooks Automation** in Resolver, playbook library content must be set up by creating playbooks and templated tasks. Users can add templated tasks to task groups to streamline the playbooks automation and workflow by grouping tasks that are often performed together.

Playbook library content can be set up manually by following the steps in this article.

Playbook library content can also be set up in bulk by using the data import feature. When using this feature, select the **Template** workflow state on the task template objects that are to be imported.



*Note:* Using data import is recommended for a quick implementation.

### **User Account Requirements**

The user account you use to log into Resolver must be assigned to the **Playbook Manager** role to build the Playbook Automation content library.

### **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 Home dropdown.



		⊕ Q Search		•••	® @
Home	∽ My Ta	asks			
	My Tasks	\$ SORT	Q SEARCH	Corrective Action	Θ
	LE-36 Ac	counting Error Igned to me on <b>Dec 10th, 2024</b>	REVIEW		
	CA-2 AC	tion Plan 002 gned to me on <b>Dec 10th, 2024</b>	REVIEW		
	CA-5 AC	tion Plan 005 gned to me on <b>Dec 10th, 2024</b>	REVIEW	0 1 2 Review	3
	LE-2 Bre	each of Investment Restriction or Guideline gned to me on <b>Dec 10th, 2024</b>	TRIAGE		
	LE-6 Co	nflict of interest gned to me on <b>Dec 10th, 2024</b>	REVIEW	Issue Workflow State	
	LE-9 Da	ta/Software Licensing Error gned to me on <b>Dec 10th, 2024</b>	TRIAGE	1	
	LE-15 Inc	correct advisor charges Igned to me on Dec 10th, 2024	TRIAGE	0 1	2

Home Dropdown

2. From the **Home** dropdown, select the **Playbook Application** application.

		( Q Search			\$ @ 2
Home	~	My Tasks			
Home					
Playbook Application	My Tas	sks \$ SORT	Q SEARCH	Orrective Action	
Risk Management				Workflow State	
Reports	36	Accounting Error	REVIEW		
Library		Assigned to the on Dec 2001, 2024		2	
	CA-2	Action Plan 002 Assigned to me on Dec 10th, 2024	REVIEW		
	CA-5	Action Plan 005 Assigned to me on Dec 10th, 2024	REVIEW	U I Z 3	
	LE-2	Breach of Investment Restriction or Guideline Assigned to me on Dec 10th, 2024	TRIAGE		
	LE-6	Conflict of interest Assigned to me on Dec 10th, 2024	REVIEW	ISSUE Workflow State	
	LE-9	Data/Software Licensing Error Assigned to me on Dec 10th, 2024	TRIAGE	1	
	LE-15	Incorrect advisor charges Assigned to me on Dec 10th, 2024	TRIAGE	0 1 2	
	1-4	Insufficient control consciousness	REVIEW	• rootew	



### Adding a New Playbook

1. From the *Playbook Automation* screen, click the **New Playbook** button.

		€ Q Search	)	\$ @ L
Playbook Application	~	Playbook Automation		
	Playb	book Automation	+ NEW PLAYBOOK + NEW TASK GROUP + CREATE TASK	
	Playbo	ooks	Sorted by Unique ID (Ascending)	
	Task G	roups	Sorted by Unique ID (Ascending)	
	TG-1	Evidence Gathering	Active	
	Tasks		Sorted by Unique ID (Ascending)	
	T-1	Notify Authorities	Template	

#### New Playbook Button



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

	$(\pm)$	Q Search			\$ @ 2
~	Playbook Automation				
Creat	e a New Playbook			•••	
Playbo	ook Name				
Descri	ption				
			CREATE		
				CANCEL	
	Creat	Playbook Automation			Q Sarch.     Playbook Name     Playbook Name     Description     CREATE     CREATE     CREATE CARCEL

#### Playbook Name Field

3. **(Optional):** Enter a description of the playbook in the **Description** field.

		€ Q Search			\$ ® \$
Playbook Application	V Playbook Auton	ation			
	Create a New	Playbook		•••	
	Description			l	
			CREATE		
				CANCEL	

#### Description Field

#### 4. Click the **Create** button.

		Q Search.	 )		\$ ® \$
Playbook Application	~	Playbook Automation			
	Crea	te a New Playbook		•••	
	Playb	oook Name			
	Desc	ngtion			
			CREATE		
				CANCEL	



Create Button

## Adding a Playbook Task Group

1. From the *Playbook Automation* screen, click the **New Task Group** button.

			\$ ? L
Playbook Application	V Playbook Automation		
	Playbook Automation	+ NEW PLAYBOOK + NEW TASK GROUP + CREATE TASK	
	Playbooks	Sorted by Unique ID (Ascending)	
	Task Groups	Sorted by Unique ID (Ascending)	
	Tasks	Sorted by Unique ID (Ascending)	
	T-1 Notify Authorities	Template	

New Task Group Button

2. Enter a name for the task group in the **Task Group Name** field.

		④ Q Search			\$ @ L
Playbook Application	~	Playbook Automation			
	Crea	e a New Task Group			
	Task	roup Name			
	Desci	ption			
	Tasks				
	Nam	unique ID	Workflow State		
	No da	a to display			
	Q. 9	tart typing to find an existing Task		+	
	Playb	oks			
		Add Playbooks		+	

Task Group Name Field

3. (Optional): Enter a description of the task group in the **Description** field.



		(Q Search			\$ @ L
Playbook Application	V Playbook Auton	nation			
	Create a New	Task Group			
	Task Group Name Evidence Gathering				
	Description				
			A		
	Tasks				
	Name	Unique ID	Workflow State		
	No data to display				
	Q Start typing to find	an existing Task		+	
	Playbooks				
	Add Playbooks			+	

Description Field

4. In the **Tasks** section, add tasks to the task group by searching for the task name. Click the **Create New** icon to create a new task to add to the task group.

			€ Q Search				\$ @ L
Playbook Application	~	Playbook Automation					
	Crea	te a New Task G	iroup			•••	
	Task	Group Name					
	Evi	dence Gathering					
	Desc	ription					
			Æ				
	Task	5					
	Nan	ne U	nique ID	Workflow State			
	No d	ata to display					
	Q :	Start typing to find an existing Ta	ask		+	·	
	Playt	books					
	٩	Add Playbooks				+	

Task Section

5. From the **Playbooks** drop-down, select the relevant playbooks you wish this task group to be added to. Click the **Create New** icon to create a new playbook to add the task group to.

		( )	Q Search			\$ ? <u>2</u>
Playbook Application	~	Playbook Automation				
	Task C	iroup Name				
	Evid	lence Gathering				
	Descri	ption				
			h			
	Tasks					
	Name	2	Unique ID	Workflow State		
	Notif	y Authorities	T-1	😑 Template	×	
	Q S	tart typing to find an existing Task			+	
	Playbo	ooks				
	۹.	Add Playbooks			+	
					CREATE	

Playbooks Drop-down



#### 6. Click the **Create** button.

		G Search			\$ @ \$
Playbook Application	V Playbook Automation				
	Task Group Name				
	Evidence Gathering				
	Description				
			00		
	Tasks				
	Name	Unique ID	Workflow State		
	Notify Authorities	T-1	😑 Template	×	
	<ol> <li>Start typing to find an existin</li> </ol>	g Task		+	
	Playbooks				
	Q <u>Theft</u> ×			+	
				CREATE	

#### Create Button

## **Creating a Templated Task**

1. From the *Playbook Automation* screen, click the **Create Task** button.

		( Q Search		\$ 3 \$
Playbook Application	~	Playbook Automation		
	Playl	book Automation	+ NEW PLAYBOOK + NEW TASK GROUP + CREATE TASK	
	Playb	ooks	Sorted by Unique ID (Ascending)	
	Task (	Groups	Sorted by Unique ID (Ascending)	
	Tasks		Sorted by Unique ID (Ascending)	



2. Enter a name for the task in the **Task Name** field.

		(Q Search		\$ \$	) 8
Playbook Application	V Playbook Automation				
	Create a New Tack				
	Create a New Task				
	Task Name 😣		Task Group		
			Q. Add Task Group	+	
	Description		Time to Complete (Days)		
			Assign All Tasks		
			🕗 Not Set		
			Inherit from parent		
			Assign all Tasks		
			CREATE TEMPLATED TASK		
				CANCEL	
				CANCEL	



#### Task Name Field

3. (Optional): Enter a description of the task in the **Description** field.

		④ Q Search			\$ ? L
Playbook Application	V Playbook Automation				
	Create a New Task		Task Group         Q. Add Task Group         Time to Complete (Days)         Assign All Tasks         Q. Not Set         Inherit from parent         Assign all Tasks		
			CREATE TEMPLATED TASK		
				CANCEL	

Description Field

4. From the **Task Group** field, add the task to a task group by searching for the task group name. Click the **Create New** icon to create a new task group to add the task to.

		⊕ (Q Search	)		\$ @ L
Playbook Application	V Playbook Automation				
	Create a New Task		•••		
	Notify Authorities		Q. Add Task Group	+	
	Description		Time to Complete (Days) Assign All Tasks Not Set Inherit from parent Assign all Tasks		
			CREATE TEMPLATED TASK		
				CANCEL	

#### Task Group Field

5. In the **Time to Complete (Days)** field, enter the number of days required to complete a task. This field requires a specific number of days (e.g., 14 days) and auto-populates a due date.



		⊕ Q Search			\$ @ L
Playbook Application	V Playbook Automation				
	Create a New Task			•••	
	Task Name 🕜		Task Group		
	Description		Kool rask storage		
			CREATE TEMPLATED TASK		
				CANCEL	

Time to Complete (Days) Field

- 6. In the **Assign All Tasks** section, select one of the following:
  - **Not set:** With this option, no users are assigned to generated Tasks.
  - Inherit from parent: This option inherits user task assignments from the parent object that the tasks are being generated on (applied on). For example, all tasks generated could be auto-assigned to the Incident Owner user linked to the incident that the tasks are being generated on. To pick a role to pull task assignments from for this logic, selections are made when defining the Playbook Automation Rule:
     Inherit Assignee (Applied Object Type) drop-down.
  - **Assign all tasks:** This option can be used to assign each task out individually to a specific user or user group from the same Org/different team.

		⊕ Q Search	•••)		\$ @ L
Playbook Application	V Playbook Automation				
	Create a New Task			•••	
	Task Name 🔞		Task Group		
	Notify Authorities		Q Add Task Group	+	
	Description		Time to Complete (Days)		
			Assign All Tasks           Not Set		
			Inherit from parent		
			Assign all Tasks		
			☎ CREATE TEMPLATED TASK		
				CANCEL	

Time to Complete (Days) Field

7. Click the Create Templated Task button.



		€ Q Search	)		\$ @ £
Playbook Application	V Playbook Automation				
	Create a New Task			•••	
	Task Name 🔞		Task Group		
	Notify Authorities		Q Add Task Group	+	
	Description		Time to Complete (Days)		
			Assign All Tasks		
		ß	Inherit from parent		
			Assign all Tasks		
			r		
			CREATE TEMPLATED TASK		
				CANCEL	

Create Templated Task Button