

Setting Up Playbook Library Content

Last Modified on 02/14/2025 2:48 pm EST

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

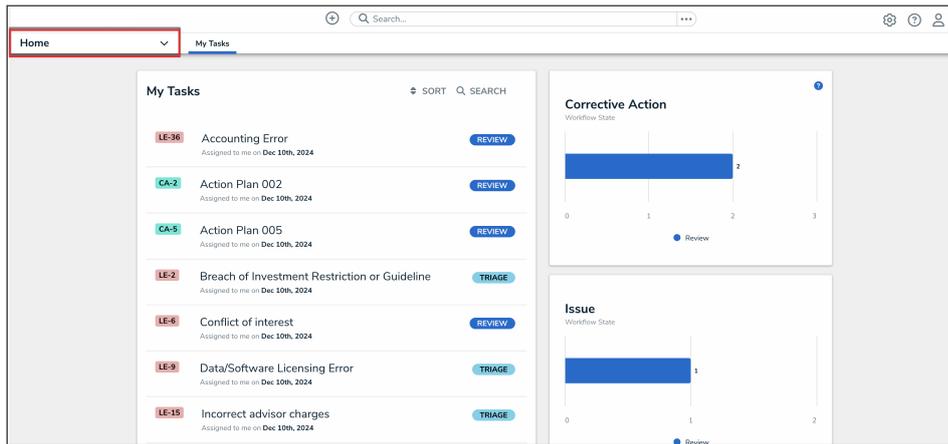
The user account you use to log into Resolver must be assigned to the **Playbook Manager** role to build the Playbook Automation content library.

Related Information/Setup

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

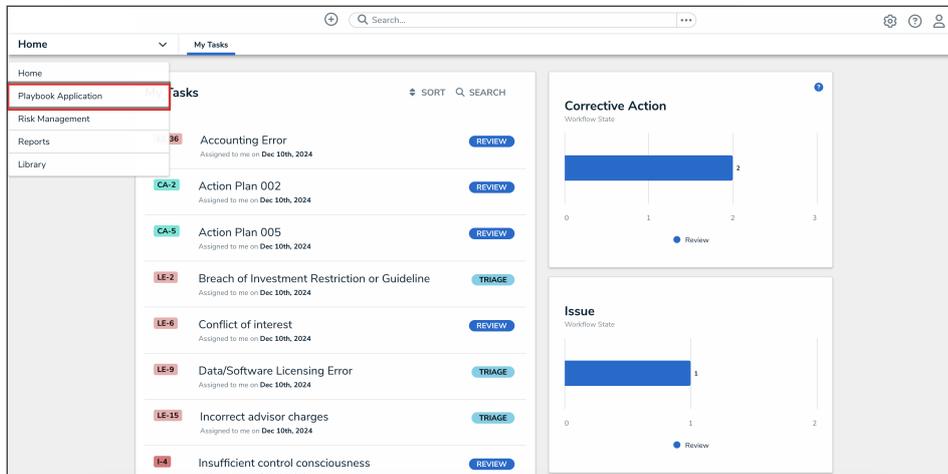
Navigation

1. From the **Home** screen, click the **Home** dropdown.



Home Dropdown

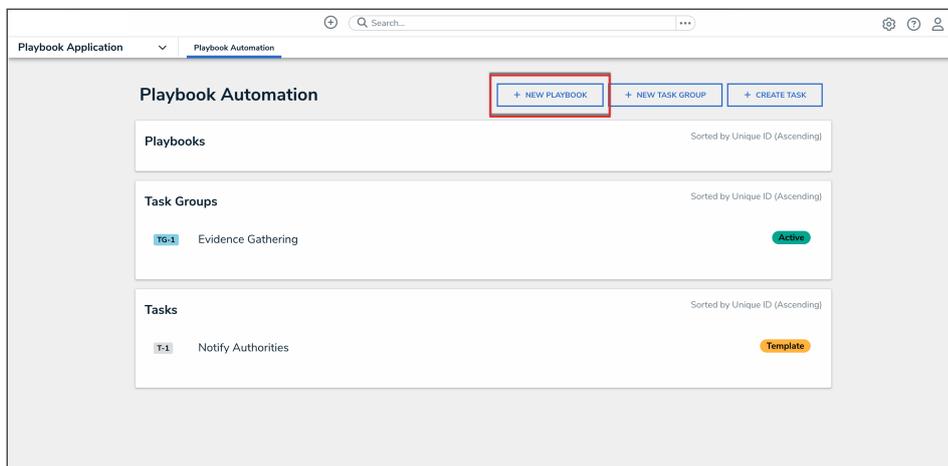
- From the **Home** dropdown, select the **Playbook Application** application.



Playbook Application

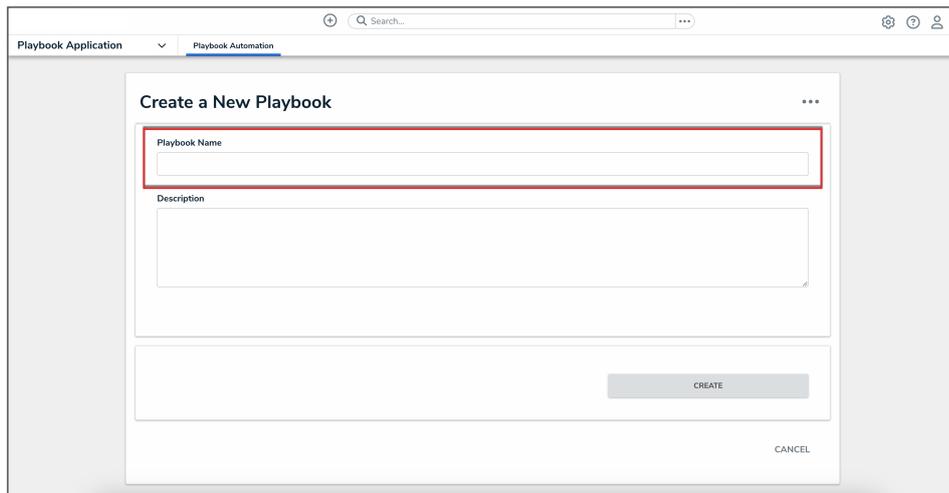
Adding a New Playbook

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



New Playbook Button

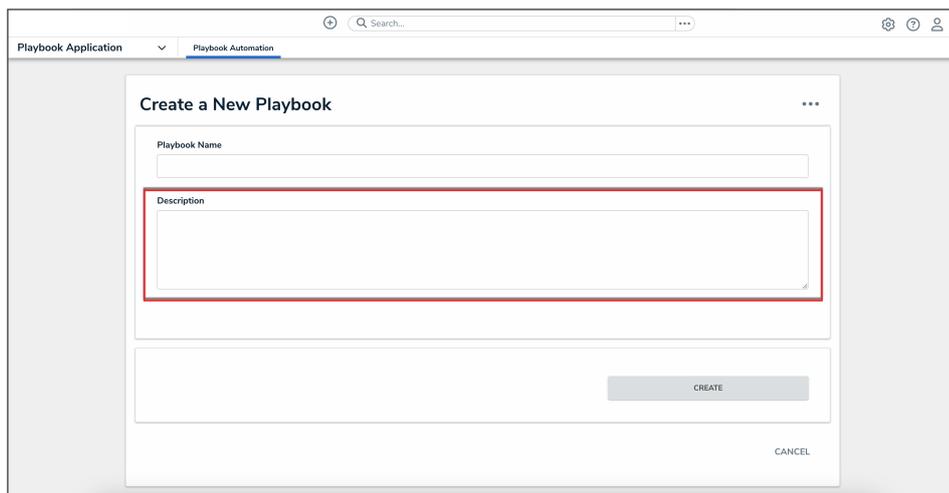
2. Enter a name for the playbook in the **Playbook Name** field.



The screenshot shows a web application interface for creating a new playbook. The page title is "Create a New Playbook". There are two main input fields: "Playbook Name" and "Description". The "Playbook Name" field is highlighted with a red border. Below the input fields are two buttons: "CREATE" and "CANCEL". The "CREATE" button is highlighted with a red border.

Playbook Name Field

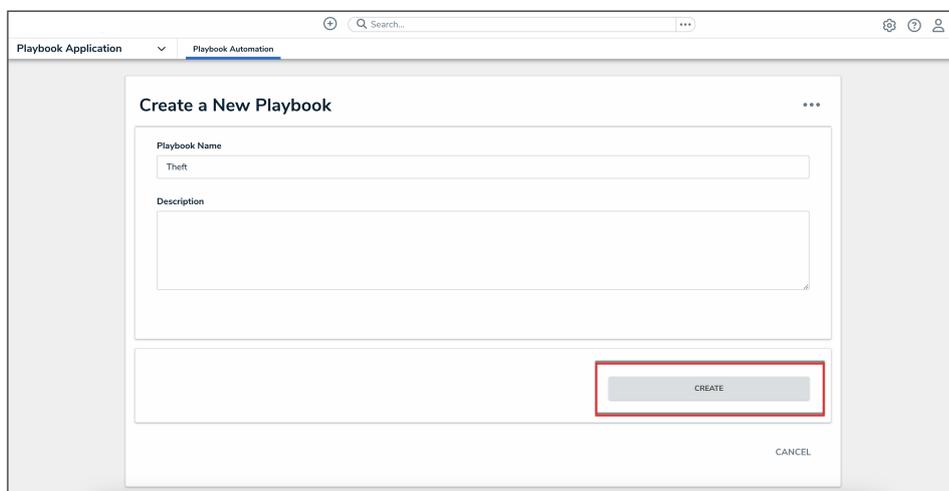
3. **(Optional):** Enter a description of the playbook in the **Description** field.



The screenshot shows the same "Create a New Playbook" form. The "Description" field is now highlighted with a red border. The "Playbook Name" field is empty. The "CREATE" and "CANCEL" buttons are still visible at the bottom.

Description Field

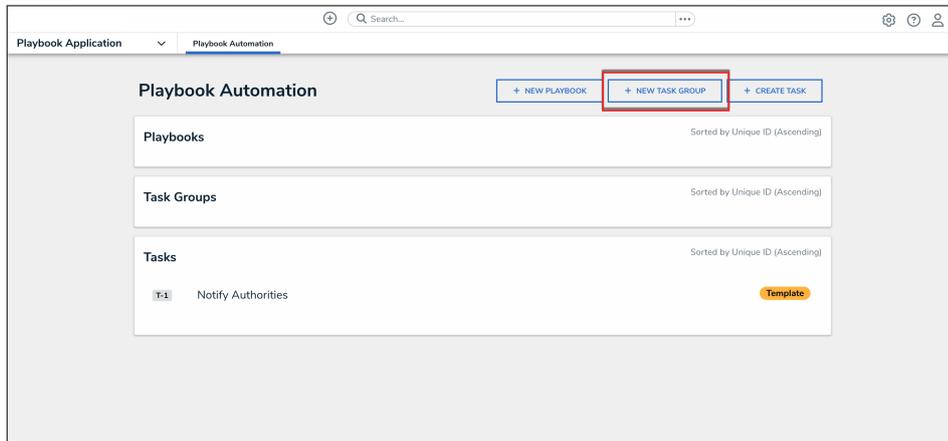
4. Click the **Create** button.



The screenshot shows the "Create a New Playbook" form. The "Playbook Name" field now contains the text "Theft". The "Description" field is empty. The "CREATE" button is highlighted with a red border. The "CANCEL" button is still visible at the bottom.

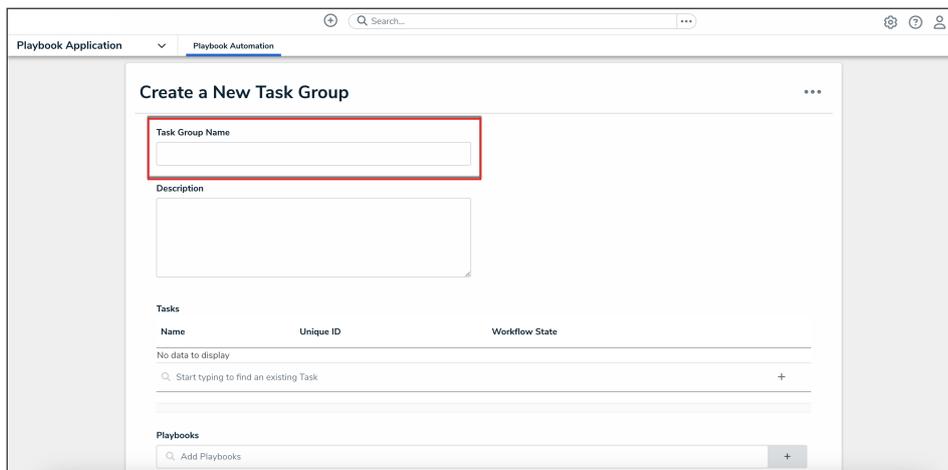
Adding a Playbook Task Group

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



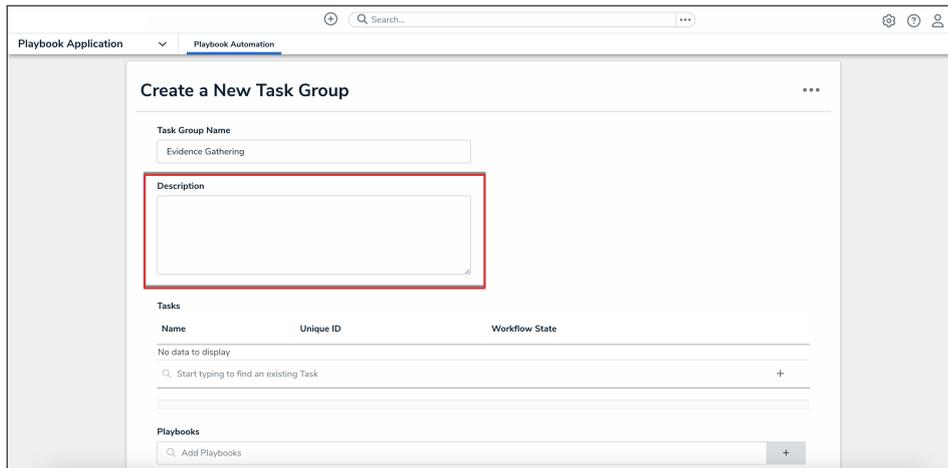
New Task Group Button

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



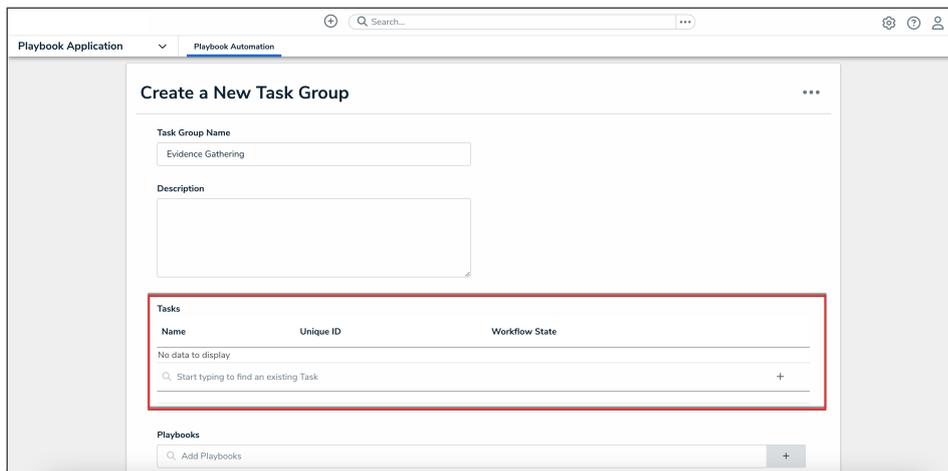
Task Group Name Field

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



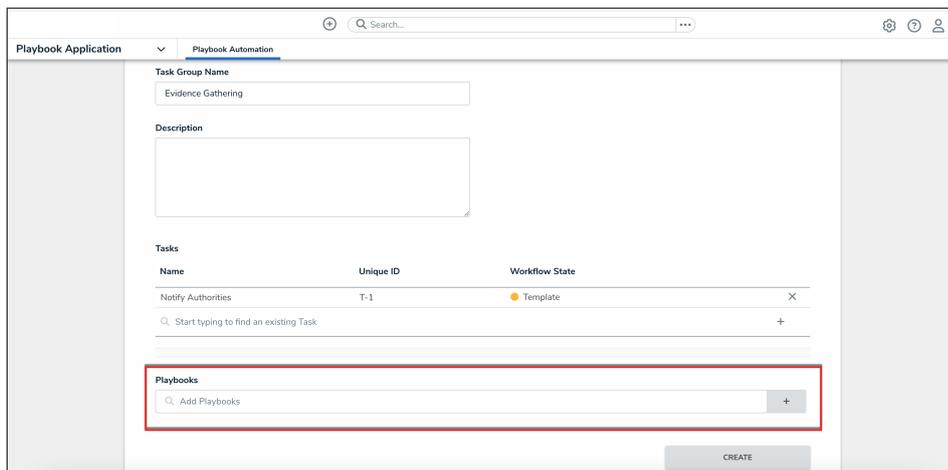
Description Field

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.



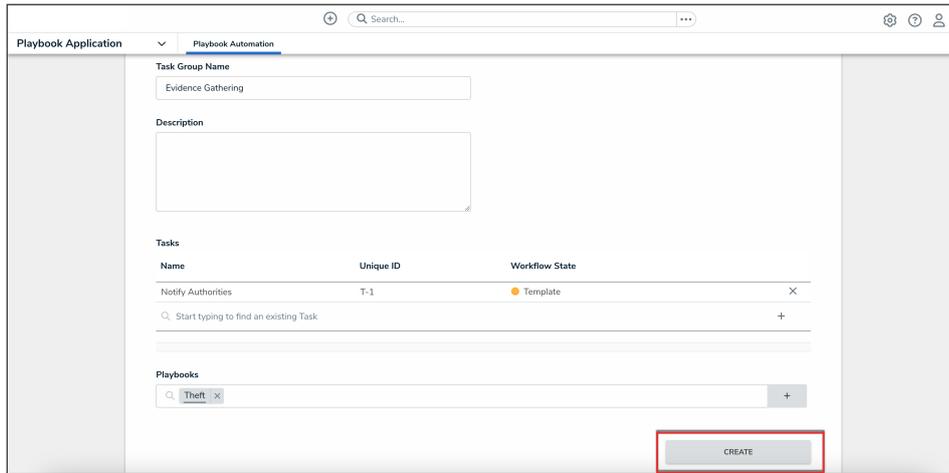
Task Section

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.



Playbooks Drop-down

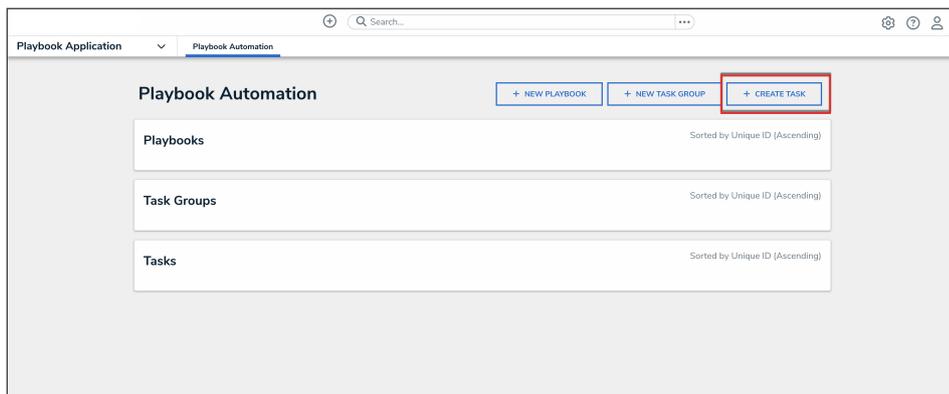
6. Click the **Create** button.



Create Button

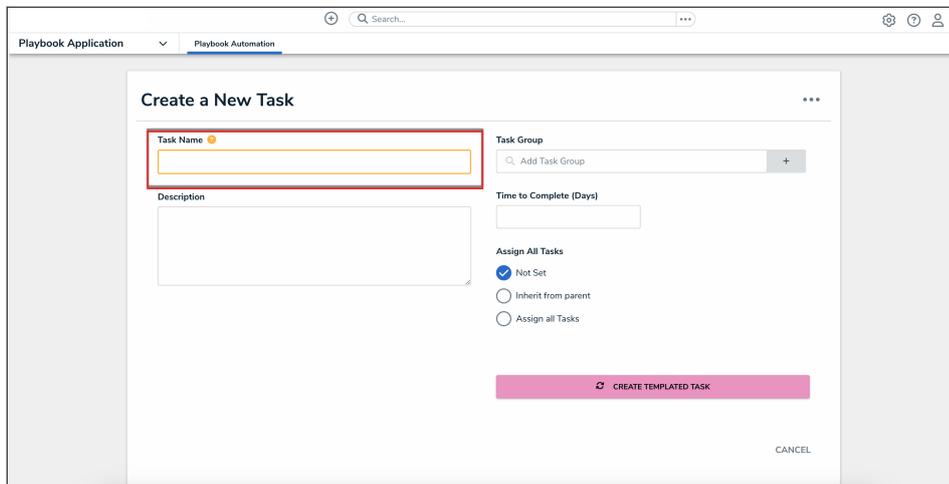
Creating a Templated Task

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



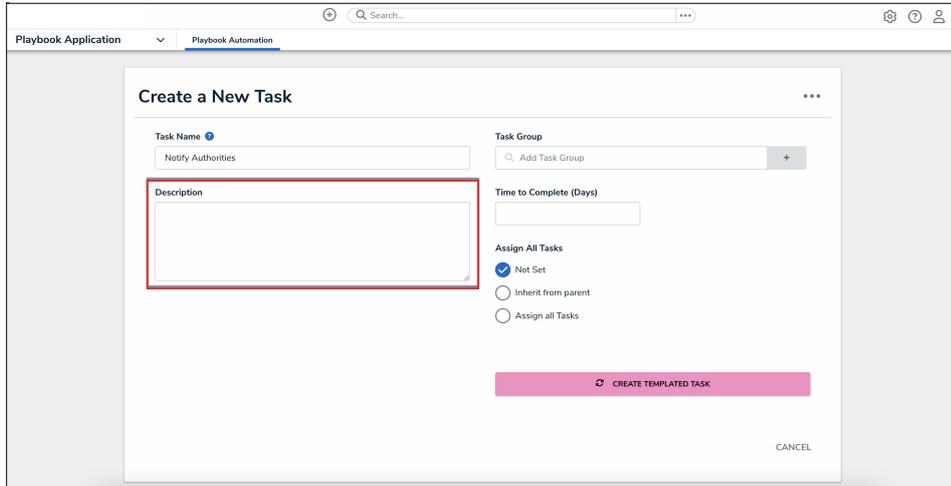
Create Task Button

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



Task Name Field

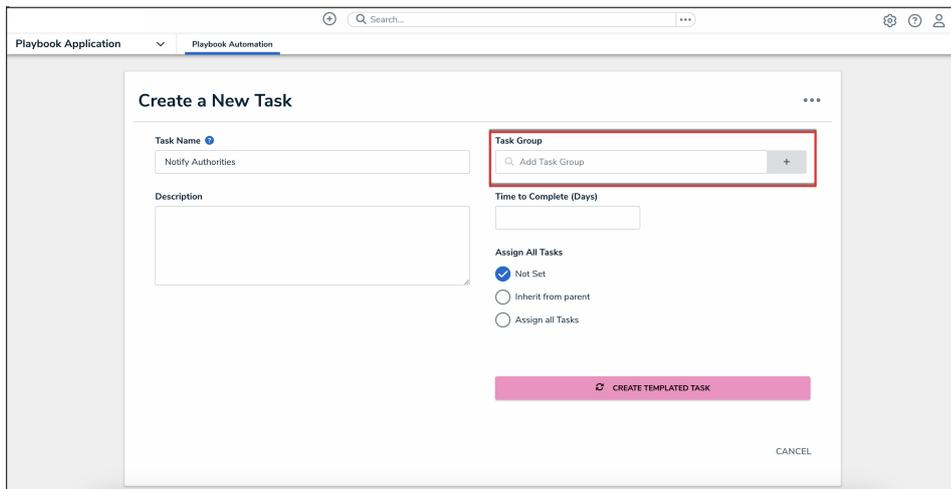
3. **(Optional):** Enter a description of the task in the **Description** field.



The screenshot shows the 'Create a New Task' form in the 'Playbook Automation' section. The form includes fields for 'Task Name' (with a dropdown menu), 'Task Group' (with a search and add button), 'Description' (a text area), 'Time to Complete (Days)' (a text input), and 'Assign All Tasks' (radio buttons for 'Not Set', 'Inherit from parent', and 'Assign all Tasks'). A pink 'CREATE TEMPLATED TASK' button and a 'CANCEL' link are at the bottom. The 'Description' field is highlighted with a red border.

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.



The screenshot shows the 'Create a New Task' form. The 'Task Group' field, which includes a search icon and an 'Add Task Group' button, is highlighted with a red border. Other fields and buttons are visible as in the previous screenshot.

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.

Playbook Application | Playbook Automation

Search...

Create a New Task

Task Name: Notify Authorities

Task Group: Add Task Group

Description: [Empty text area]

Time to Complete (Days): [Empty input field]

Assign All Tasks:

- Not Set
- Inherit from parent
- Assign all Tasks

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.

Playbook Application | Playbook Automation

Search...

Create a New Task

Task Name: Notify Authorities

Task Group: Add Task Group

Description: [Empty text area]

Time to Complete (Days): [Empty input field]

Assign All Tasks:

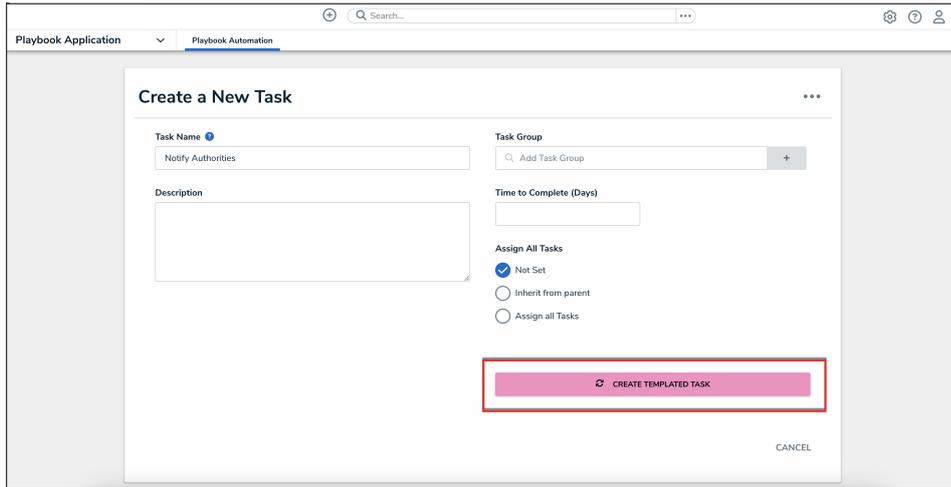
- Not Set
- Inherit from parent
- Assign all Tasks

CREATE TEMPLATED TASK

CANCEL

Time to Complete (Days) Field

7. Click the **Create Templated Task** button.



Create Templated Task Button