

Configuring the Driver Object Type Form for Playbooks Automation

Last Modified on 02/13/2025 10:01 am EST

Overview

When a user creates a Playbook Automation rule, they must select an object type that will drive the logic of the automation. Additional configuration of the driver object type form is required to ensure it is ready to be used with playbooks.

User Account Requirements

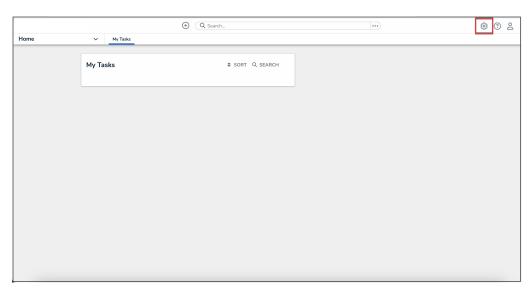
The user account you use to log into Resolver must be an Administrator to edit forms.

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 **Administration** icon.



Administration Icon

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



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Administrator Settings Menu

3. From the *Admin Overview* screen, click the **Configurable Forms** tile under the **Views** section.

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Admin Overview	~				
	Data Model		Views		
	Object Types	Object Type Groups	Configurable Forms	Data Visualizations	
	Fields Ass	sessments Data Definitions	Dashboard Data Sets	Dashboard Builder	
	Playbooks Automation				

Configurable Forms Tile

4. From the *Configurable Forms* screen, enter a form name for the driver object type you selected for the Playbook Automation rule in the **Search** field.

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	C. incident type]	
	BU Business Unit - IM - Edit This is the primary edit for Business Unit for Corporate Security applications. Provides all Business Unit relationships data as well as flags that drive functionality on related Incidents. Report for related Incident Type is available from the form.	
	Incident Type - IM - Create	
	Incident Type - IM - Edit	
	Incident Type - IM - Hierarchy	

Search Field

5. Click the form that you want to edit.

Configuring the Driver Object Type Form



 From the Relationships section in the Form Elements panel, drag and drop the Auto-Generate Playbooks relationship to an existing or new section on the form.

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Object Name (T-123) CREATION		/		Incident	
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Auto-Generate Playbooks Relationship

2. From the **Relationships** section in the **Form Elements** panel, drag and drop the **Suggest Playbooks** relationship to an existing or new section on the form.

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Suggest Playbooks Relationship

3. Click the **Done** button to save your changes.

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Done Button