

Configuring the Applied Object Type Form for Playbooks Automation

Last Modified on 02/13/2025 10:00 am EST

Overview

When a user creates a Playbook Automation rule, they must select an object type that the Playbook Automation rule will be applied to. Additional configuration of the applied 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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Home	✓ My Tasks				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	
	Fields	Data Definitions	Dashboard Data Sets Dashboard Builder	
	Playbooks Automation			

Configurable Forms Tile

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

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Views	✓ Forms Data Visualizations Dashboard Data Sets Dashboard Builder	
	Admin: Configurable Forms + CREATE CONFIGURABLE FORM	
	Q 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 Types 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 Applied Object Type Form



1. From the Relationships section in the Form Elements panel, drag and

drop the **Playbooks to Apply** relationship to an existing or new section on the form.

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Object Type: Incident			Linked Incidents	
			Location	
Form Layout			Losses & Recoveries	
			Market	
			Narratives	
			Person of Interest List	
			Playbooks to Apply	
1 COLUMN LEFT SIDEBAR RIGHT SIDEBAR			Playbooks Used	
			Primary Incident Type	Ĩ
		/	Region	
Object Marine			Related Incidents	
			Responding Person(s)	

Playbooks to Apply Relationship

2. From the Relationships section in the Form Elements panel, drag and

drop the **Playbooks Used** relationship to an existing or new section on the form.

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		Involved Organizations
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Object Type: Incident		Linked Incidents
	•	Location
Form Layout		Losses & Recoveries
		Market
		Narratives
		Person of Interest List
		Playbooks to Apply
1 COLUMN LEFT SIDEBAR RIGHT SIDEBAR		Playbooks Used
		Primary Incident Type
Object Name	/	Region
		Related Incidents
		Responding Person(s)

Playbooks to Apply Relationship

 From the Actions section in the Form Elements panel, drag and drop the Apply Playbooks action to an existing or new section on the form.

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Apply Playbooks Actions



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

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Done Button