Case playbooks

8 declared fields for Case playbook. Required fields include Name.

https://docs.qintoravacloud.com/forms/csm_playbooks/

About this form

Use this reference to identify built-in form labels, data types, and validation. Specialized workspaces can render a subset of these fields or provide workflow-specific controls. Your role, record state and tenant configuration can change what you see.

Registry key

`csm_playbooks`

Record label

Case playbook

Field definitions

Field	Type or reference	Built-in rules	Choices and constraints
Name `name`	text	Required Default list field	—
Description `description`	textarea	Optional by default	—
Category `category`	select	Default list field	`all`, `technical`, `billing`, `service_request`, `complaint`, `outage`, `maintenance`
Version `version`	text	Read-only	—
Active `active`	boolean	Default list field	—
Demo dataset `demoDataset`	text	Read-only Default list field	—
Created `createdAt`	text	Read-only	—

Field	Type or reference	Built-in rules	Choices and constraints
Updated `updatedAt`	text	Read-only	—

Related procedure: Create and resolve a customer case.

Verification evidence

The disposable audit exercised 3 applicable validation assertions on this definition. The authenticated collection read returned HTTP 200. See the verification matrix for scope.

Collection read results by built-in role

These statuses were observed over HTTP with one role per disposable MFA account. A successful list response can be empty and does not establish individual record, field, or write access.

Role	HTTP status
Asset Manager	200
Change Manager	200
CMDB Manager	403
Contract manager	200
Customer service agent	200
Customer service customer	403
Customer service manager	200
Datacenter Customer	403
Datacenter Fulfiller	200
Datacenter Manager	200
Datacenter Vendor	403
EH&S auditor	403
EH&S manager	403
Executive Reader	200
Field service dispatcher	200
Field service technician	200
HR case agent	403
HR knowledge manager	403

Role	HTTP status
HR lifecycle manager	403
HR profile manager	403
Employee Relations investigator	403
HR service catalog administrator	403
Inventory Counter	403
ITIL Fulfiller	403
Knowledge Manager	200
Business Manager	200
Platform Administrator	200
Service Desk Agent	200
Vendor manager	200
Third-party risk manager	200
Employee with no workspace role	403

Edit and verify

1. Open the list from the appropriate workspace and select an existing record or a permitted create action. Confirm the intended tenant and record number.
2. Use the visible controls for the current record type and state. For reference fields, select a returned record from the lookup. Fill visible required fields and use the dedicated workflow action when the record has approval or completion gates.
3. After saving, reopen the record and compare its persisted values, state and activity to the intended change. Check the downstream linked record when the action creates one.

Troubleshoot

- Missing field or control: compare the role, module, record state, form conditions and tenant overrides.
- Lookup returns no result: check that the referenced record is active, in scope and compatible with the current field.
- Save is rejected: keep the exact validation message and compare the field key, choice, constraints and required related records.
- See Edit and troubleshoot records and Configuration Studio.