

Task Executor Guide

Welcome to Cutover!

The document will provide you with information of what to expect when you are involved in the Cutover runbooks, from logging into the Cutover platform to executing your tasks.

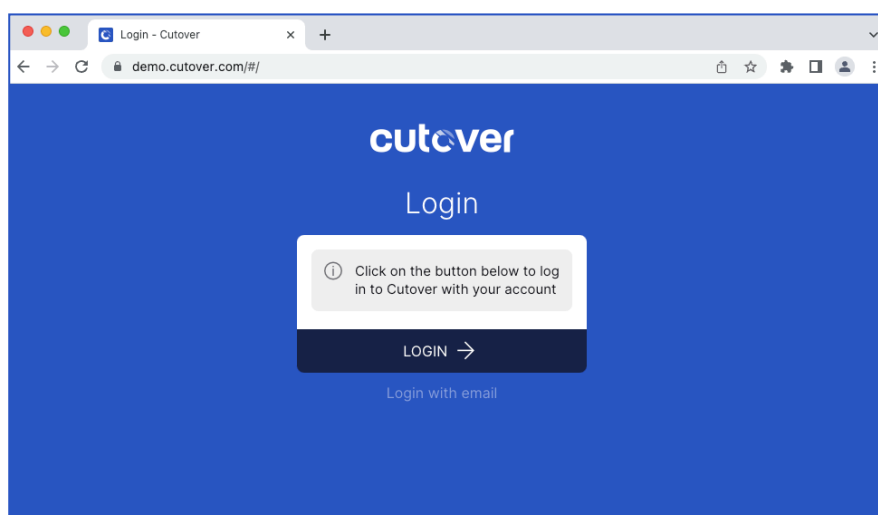
If you have any questions, please reach out to our support team via the In-App Help “?” icon.

Before an Event

How to Access:

1. **You should have received an email from Cutover with a link to register.** If you have not received anything please check your inbox or speak to your administrator. *Make a note of the URL the invite email directs you to,
2. **Once registered,** clicking the login button and enter your email and passwords.
If you have SSO, it will take you through to your internal SSO provider for verification.
3. **If you already have a Cutover account,** please just click on the “**Login**” Button

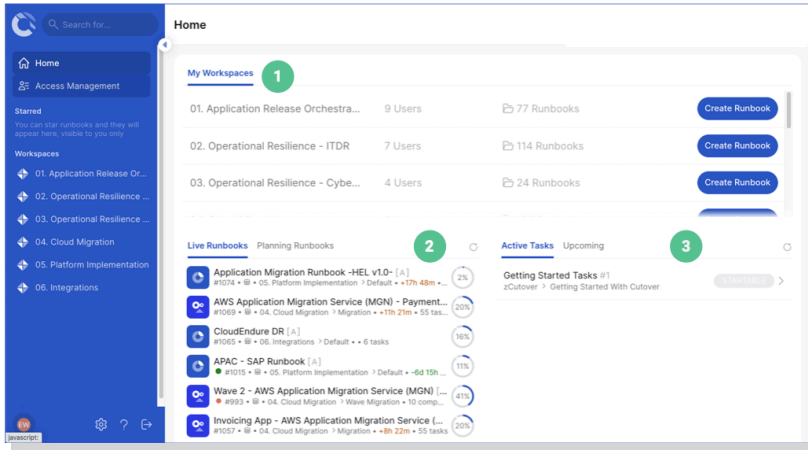
**If you have any issues connecting via SSO please contact your internal administrator.*



Once you are logged in

Home

You will be at the homepage and here you will see a few key areas:



1. **Workspaces** are broken out by line of business and you'll have access to your dedicated LOB.

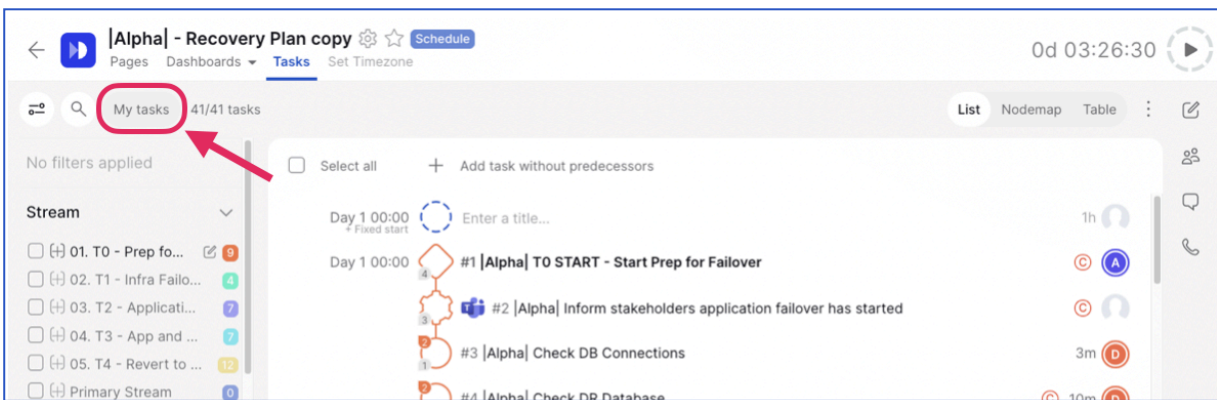
2. **Live and Planning runbooks** displays any live and upcoming runbooks you are involved in.

3. **Active and upcoming tasks** displays any tasks you are assigned to within any runbooks.

Once you are in a runbook

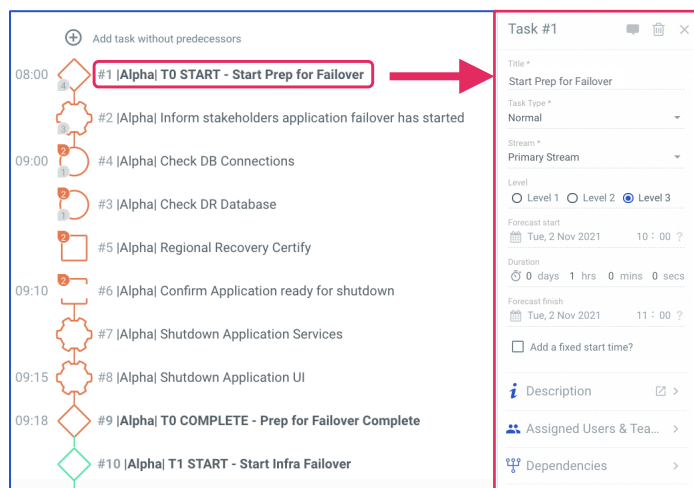
Once you are in the runbook, you will see all tasks that has been planned.

The quickest way to see all of your tasks is to click on the **"My tasks"** button above the filter section. This will display only the tasks that are assigned to you or your team.



Clicking on the task titles will open up the task detail panel, here you will be able to see all the timings, description (where you will find more task details), assigned users & teams, dependencies...etc.

It is a good practice to familiarise yourself with the tasks you are assigned to and the details of each tasks prior to the event.

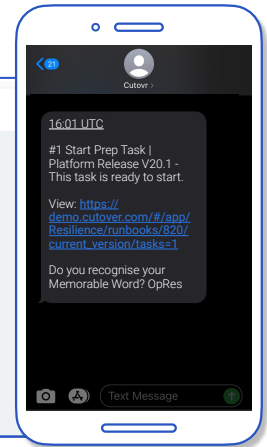
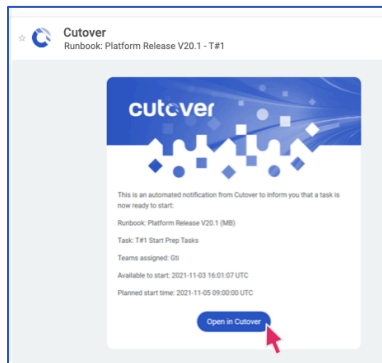


During an Event

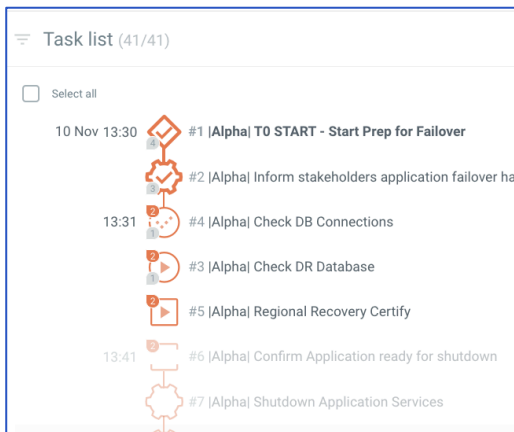
Automated Notifications

Once the runbook has started by the admin, and they have chosen to notify all participants of the start, you should receive notifications from Cutover in your email inbox notifying you that the runbook has started.

Additionally, once your assigned task is ready to start you will receive a notification with a link to the runbook directly.



Start and End Tasks



Once the runbook is live, you will see the tasks list icon change, if you are the assigned user or team and your task is ready to be started **then you can start the task by clicking the play icon.**

Different task types (different icon shapes) will have different requirements, i.e some task types will require one click to start and one click to end where as some other tasks only require one click to complete.

**Please refer to the below tables for icon states and task type behaviours.*

Task States During a Run



Startable tasks will have a visible play icon within the task. Only the team allocated to the task will be able to interact with it. **Click on the play icon to start the task.**



In **progress task**, the icon changes to a dashed tick. **In-progress tasks can be finished by clicking on the icon.**










Completed task displays a bold tick. **At the point of completion, any successors will then become startable.**



Tasks will only be startable if their dependency has been met, until then, the task will be visible but appeared to be greyed out for all users.

Task Type Behaviours

Task Icon	Task Type Name	Clicks to Complete	Task Type Description
	Normal	2	A Normal task has a duration. Users start the task with a single click, execute activity, and then complete the task with a single click.
	Milestone	1	A Milestone has zero duration, and is typically used to capture key milestones in your plan. Milestones show up in the runbook dashboard.
	Checklist	1	A Checklist task includes a due date and has zero duration, it is therefore typically used to capture activity such as check-list items you complete before embarking on the core activity of the runbook.
	Validation	2	<p>A Validation task requires a response from the user upon completion that is recorded and enables a result to be captured ie: Pass, Fail, Not Tested, with optional commentary.</p> <p>Users start the task with a single click, execute activity, and then complete the task with a single click.</p>
	SMS	1	<p>An SMS task has zero duration and can be completed with a single click.</p> <p>When a user has been assigned to an SMS task as a recipient, a message of up to 1600 characters can be created and sent during a run.</p>
	Email	1	<p>An Email task can be completed with a single click.</p> <p>When a user, or team, have been assigned to an Email task as a recipient, a formatted message can be created and sent., Recipients and content are set in the task edit panel, by clicking "Settings".</p>
	Call	2	<p>A Call task has zero duration and requires the user to click to start and another click to complete.</p> <p>When a user has been assigned to a Call task as a recipient, a formatted message can be created and spoken over a telephone call.</p>