

# Quick Start Guide



# Welcome to Cutover

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This Quick Start Guide contains information to help you get started with Cutover.

## **What is Cutover?**

Cutover interconnects your teams and technologies through Collaborative Automation, enabling you to successfully manage your IT disaster recovery, cloud migration, and release strategies.

## **Where to find additional resources?**

For more in depth information and training videos, please log into your Cutover platform and visit our Help Centre resources via the “?” located at the bottom left hand side of the screen.



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# Accessing Cutover

Authentication methods

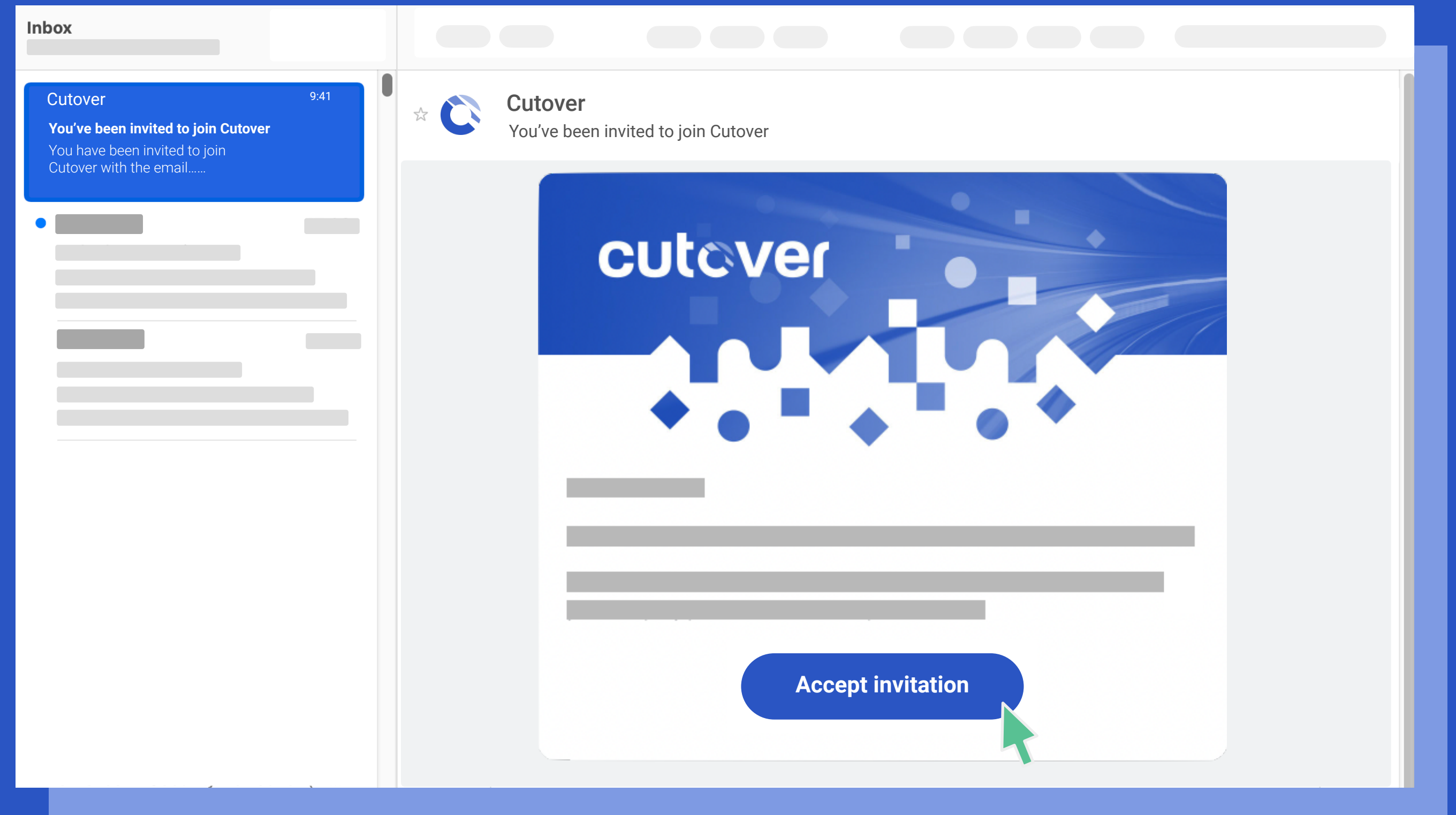
## Email and password

After you have completed the registration, the next time you access Cutover, the login screen will appear enabling you to log in with your email address and chosen password.

## Single Sign On (SSO)

Once registered, clicking the login button will take you through to your internal SSO provider for verification.

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



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.





# Homepage Overview

The screenshot shows the application's homepage with the following components and callouts:

- 1** Navigation bar: Located at the top left, containing a search bar and menu items like Home and Access Management.
- 2** My Workspaces: A section listing workspaces with columns for workspace name, number of users, and number of runbooks. Each entry has a 'Create Runbook' button.
- 3** Live Runbooks: A section displaying a list of runbooks with their status (e.g., Live, Planning), progress indicators, and details like ID, workspace, and duration.
- 4** Active Tasks: A section showing active tasks with their names and a 'STARTABLE' button.

**1** **Navigation bar** see next page for further information.

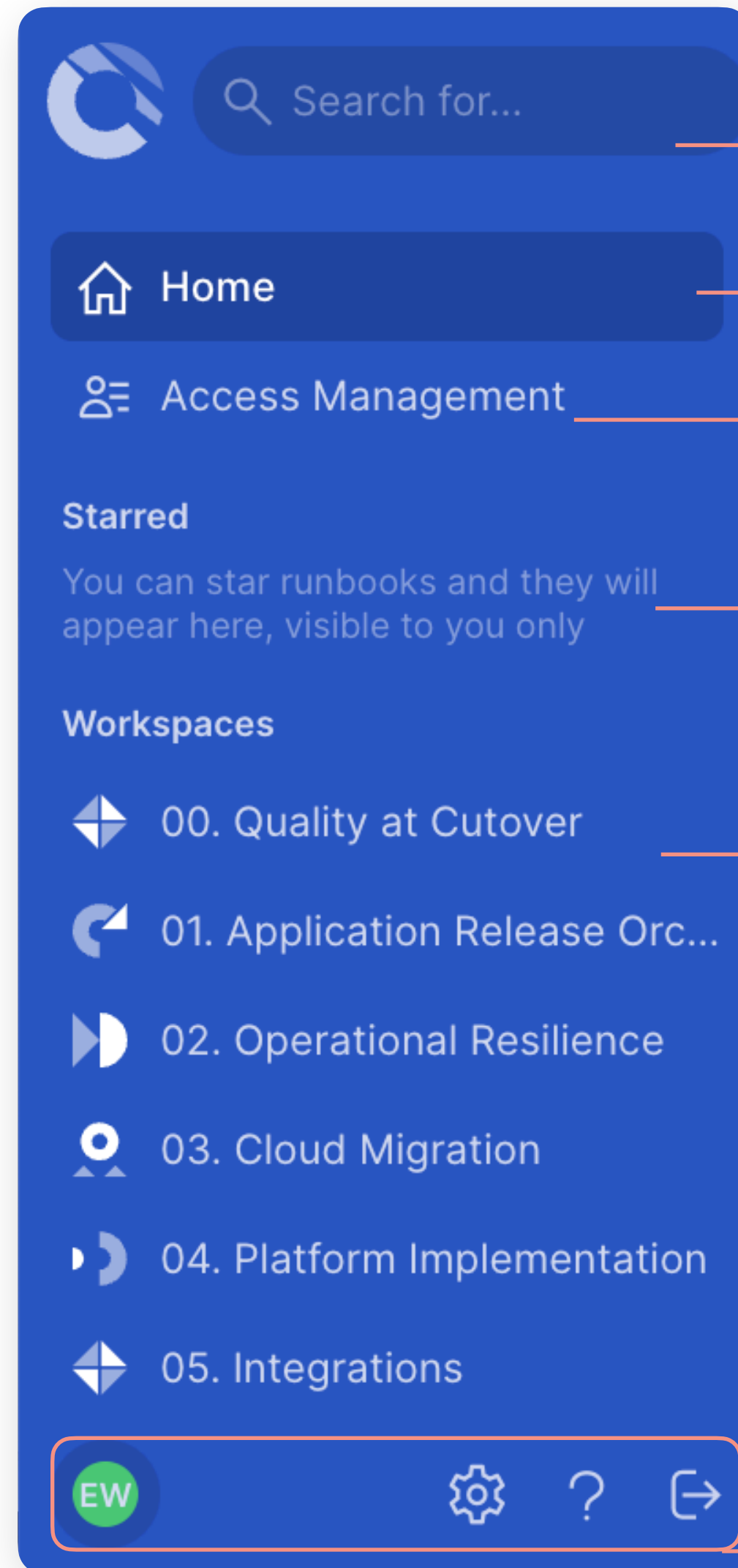
**2** **Workspaces** you are a member of and where you will find all the runbooks you have access to.

**3** **Live and Planning runbooks** provide information regarding any live and upcoming runbooks you are associated with.

**4** **Active and upcoming tasks** provides information regarding any tasks you are assigned to within any runbooks.

The lists displayed within each of these three sections will dynamically change depending on your access to workspaces, runbooks and assigned tasks.

# Navigation bar



**Global Search Bar** allows you to search or runbooks within all workspaces

**The Home icon** will return you to the home page from anywhere


**\*Access Management**, administrators can add, remove and edit users and their roles and permissions.

**Starred runbooks** section provides a quick and easy access to the list of runbooks you have starred

**Workspaces views** gives you access to a list of all the workspaces you have access to and the saved views, so you can switch between workspaces on any page

 Your user profile displays your account information, your assigned roles and history

 **\*The Settings icon** allows admins to edit Workspace, dashboard and runbook settings

 The Help icon gives you access to In-App chat support and Help Centre articles, including training and enablement videos and guides.

 Log out button

**\* Depending on the role(s) you have been assigned to, you might not see the “User” or “Settings” icon**



# User management (for Workspace managers and Global user admin)

**01** To invite new users, select the **Access management** button on the left hand side, then click on the + button on the bottom right.

**02** Once the + is selected, a pop up will present two options:

- individual users to manually add a name and email
- bulk upload via CSV.

Next you will need to assign user roles and workspace permissions. There is also a check box option to send an invitation via email with an optional custom message attached.

The screenshot shows the user management interface. On the left, a sidebar contains 'Access Management' highlighted with a red box and a red arrow. The main area shows a table of users with columns for Workspaces, First name, Last name, Nickname, Email, and Mobile number. A red arrow points to a '+' button at the bottom right of the table.

Workspaces	First name	Last name	Nickname	Email	Mobile number
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					



The 'New User' form is shown with two overlapping views. The top view shows 'Individual user' selected. The bottom view shows 'Bulk upload' selected. The form includes fields for First name, Last name, and Email (username). It also has a 'Choose file' button for CSV upload. Roles include Global admin, Global user admin, Global stakeholder, Workspace manager, Workspace stakeholder, Workspace runbook creator, Workspace member, and Centralized team manager. Notification settings include 'Send invitation?' which is checked. A 'Custom message' field is also present. Buttons for 'CANCEL' and '+ CREATE' are at the bottom.

To update or edit any existing user details, simply click on the name of the user. The Edit panel will appear on the right hand side. Click 'Save' to save any changes





# Workspace Overview

The screenshot displays the 'Operational Resilience' workspace. On the left, a blue sidebar (1) contains navigation options like Home, Access Management, and a list of workspaces including '02. Operational Resilie...'. The main content area (2) shows a workspace header with tabs for Dashboards, Runbooks, Snippets, and Central Teams. Below this, a search bar (3) and filter options are visible. A list of runbooks is shown, each with a type icon (6), name, ID, and status (7). On the right, a table view (5) displays runbook details such as due dates, times, and progress percentages. A '+ Create' button (4) is located in the top right corner.

- 1. Workspace menu and Saved views:**  
Quick access to see all runbooks, templates and any personal or public saved filters
- 2. Workspace Section :**  
Multi-runbook dashboard  
Runbooks  
Snippets  
Central Teams Management
- 3. Filters, Folder and Search :**  
Sticky Filters  
Applied Filters  
Folders & other filter options
- 4. Create Runbook**
- 5. Runbook Views and More Options**
- 6. Runbook type (icon), name, ID and other runbook details**
- 7. Runbook date, time and status**

*\* Depending on the role(s) you have been assigned to, some icons or features might not be available to you*



# Workspace Section

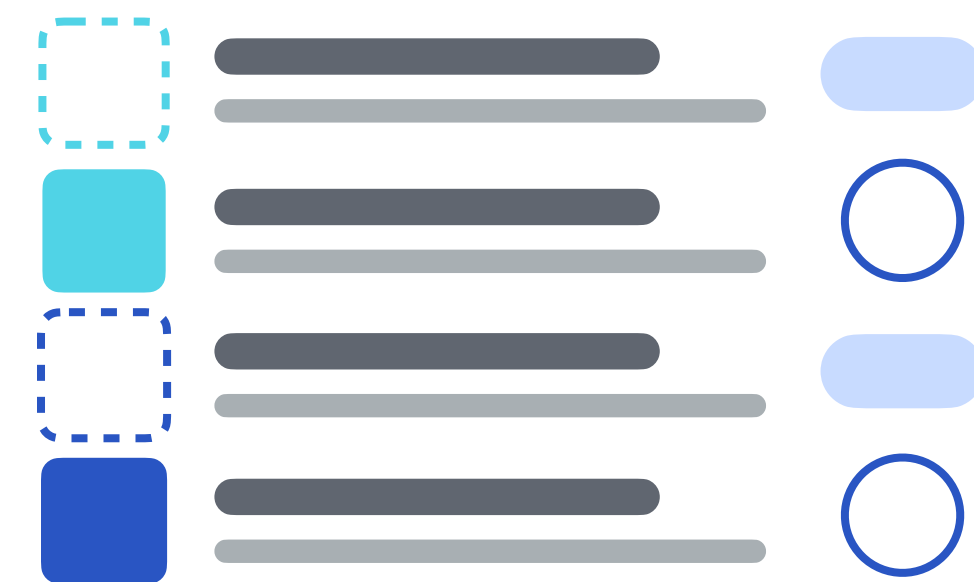
## Dashboards



The Workspace Dashboards section (Multi-Runbook Dashboard) provides a real time status of all your runbooks in one view. It is visible to all users who have access to the Workspace.

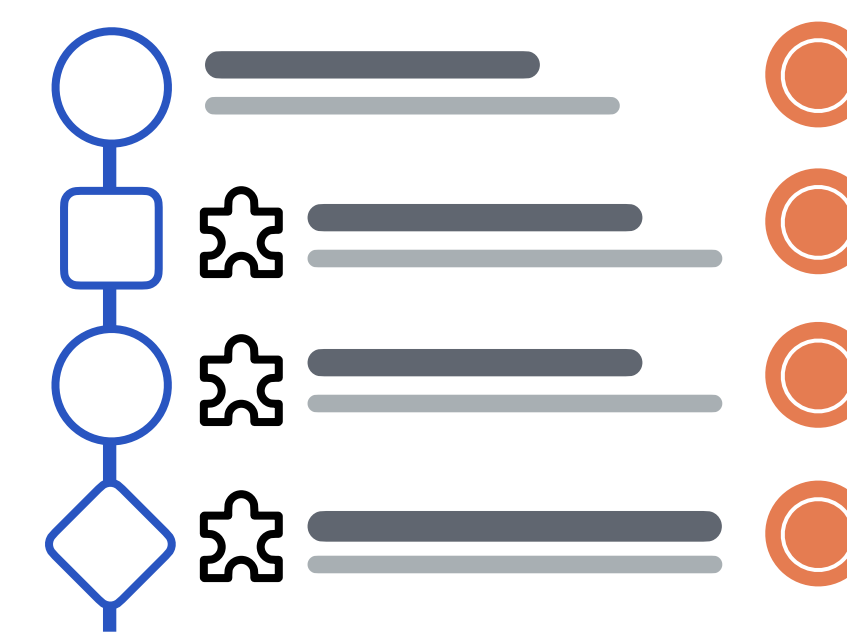
Please also see the [Multi Runbook Dashboard](#) page for more information.

## Runbooks



Runbooks will display a list of runbooks and templates you have access to. This is the default view when you first land in the workspace. You can change the way you view the list of runbooks using the “runbook views” section.

## Snippets



Snippets are a predefined set of repeatable tasks created and approved by workspace runbook creators that can be easily appended anywhere into existing runbooks by Runbook admins.

Please see the [Snippets](#) page for more information.

## Central Teams

	Name	Members count	Last updated
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

Central Teams allows admins to create and manage the central teams in your workspace, so Runbook admins can link the central teams to runbooks for fast and efficient runbook user management

For more information on central teams, please go to the next page.






# Central Teams (for Workspace manager and Centralized team manager)

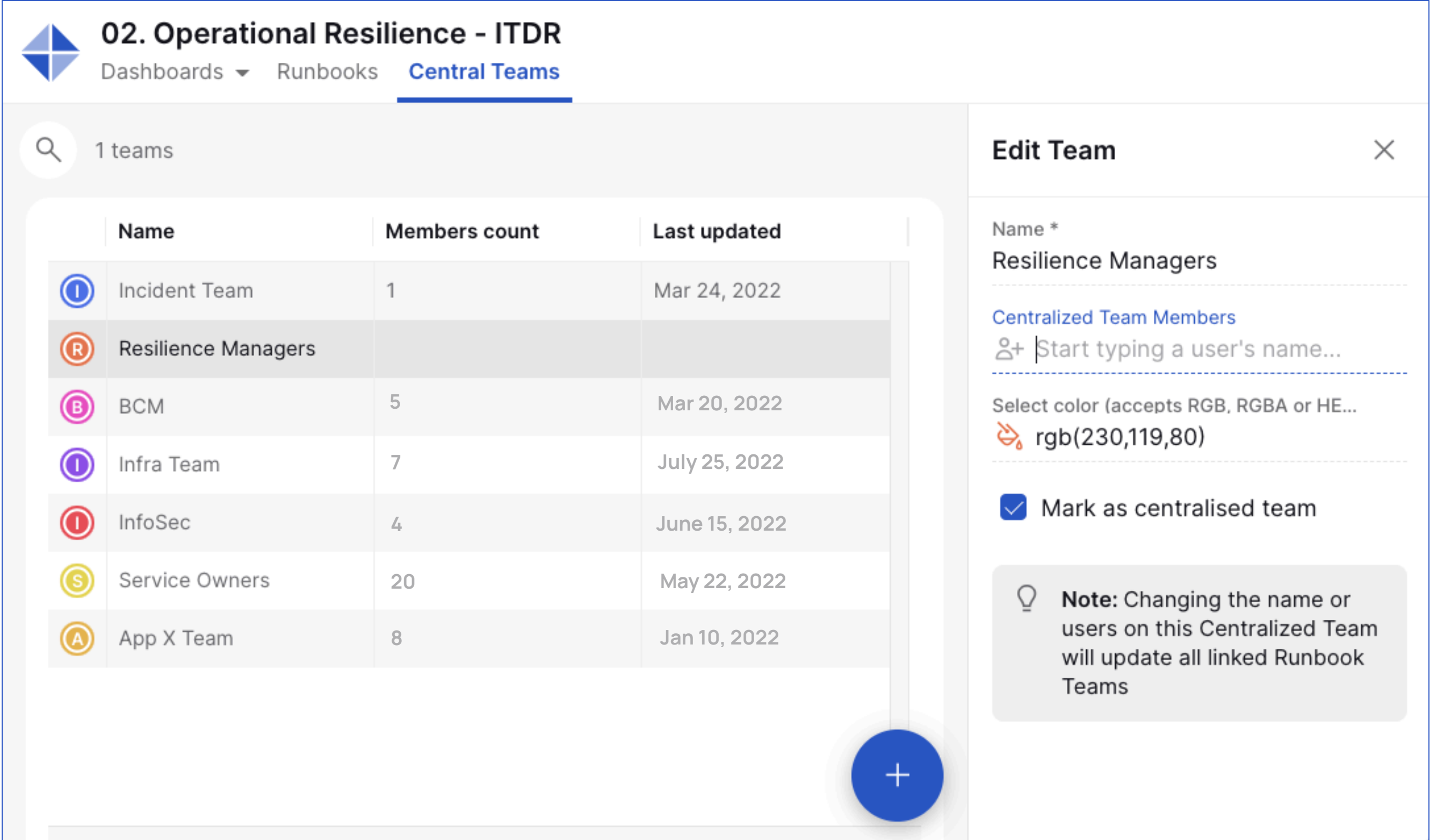
Centralised teams are managed and created at a Workspace level by users with **Workspace manager** and **Centralized team manager** permissions.

These are pre-defined teams with default users which can be link to runbooks by Runbook admins without having to create the team each time. When the central team is updated, all runbook containing the linked Central team will automatically be updated with the changes.

To create a new Central team, select the  button at the bottom right, choose either to create:

- **Individual team** manually
- **Bulk upload** via CSV

Make sure the members you are adding to the central team have the right permission to the workspace.



The screenshot shows the '02. Operational Resilience - ITDR' interface. The main view displays a list of Central Teams with columns for Name, Members count, and Last updated. A search bar shows '1 teams'. A large blue '+' button is visible at the bottom right. An 'Edit Team' modal is open for the 'Resilience Managers' team, showing fields for Name, Centralized Team Members (with a search input), and a color selection field set to 'rgb(230,119,80)'. A checkbox 'Mark as centralised team' is checked. A note at the bottom of the modal states: 'Note: Changing the name or users on this Centralized Team will update all linked Runbook Teams'.

Name	Members count	Last updated
Incident Team	1	Mar 24, 2022
Resilience Managers		
BCM	5	Mar 20, 2022
Infra Team	7	July 25, 2022
InfoSec	4	June 15, 2022
Service Owners	20	May 22, 2022
App X Team	8	Jan 10, 2022



# Workspace Views

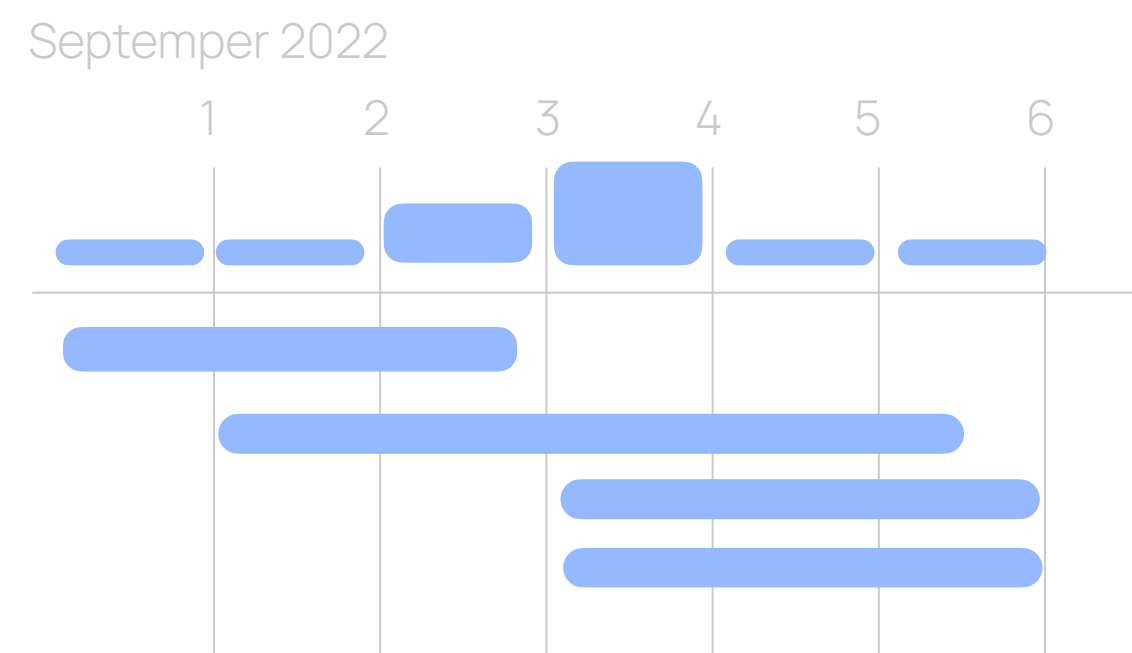


## List



The Runbook List icon provides a list of runbooks you have access to within the Workspace. Clicking on this icon will show the runbook details such as runbook ID, runbook duration, and runbook status.

## Timeline



The Runbook Timeline icon is a calendar view of your scheduled runbooks, which allows you to visualize, plan and rehearse runbooks efficiently. Timeline will automatically reflect any scheduled date and time changes to your runbooks.

\*Any runbook templates will not show up in the timeline.

## Table

ID	Name	Folder	Runbook Admin
1			
2			
3			
4			
5			

The Table view provides you with a with a set of runbook details. Some column headers will have an arrow icon next to the name which allows you to sort the table in an ascending or descending order.



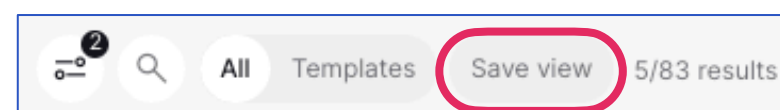
# Folders and Filters

## Filters

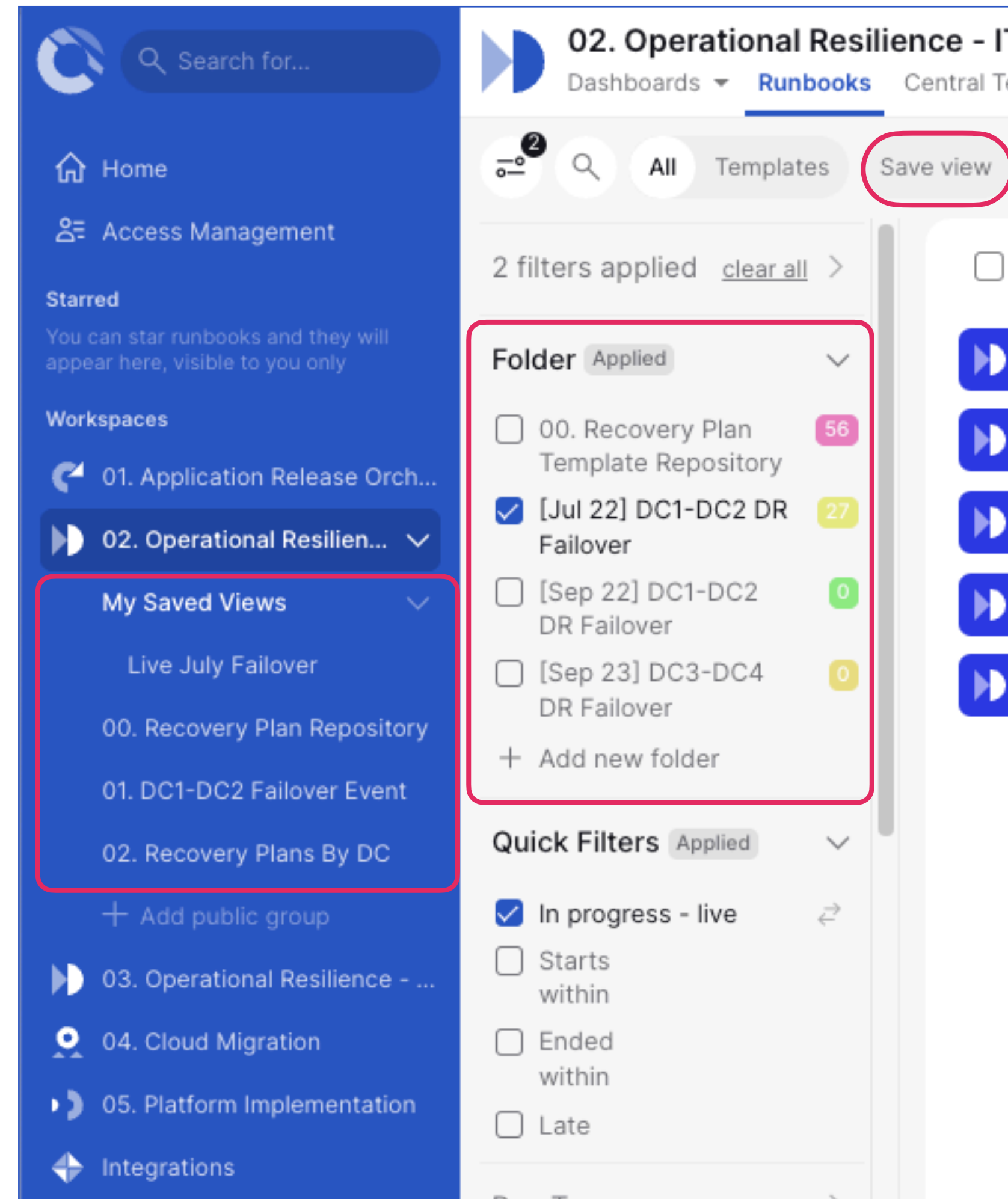
Locate a specific runbook or runbooks using filters. In your workspace view, click the filter icon. Filter results by folder, run type, runbook type, and more.

You can see all your current applied filters in the “**Applied filters**” section at the top of the filter list. Remove individual filters quickly or clear all with one click.

To save a filtered search, click Save view



A modal will appear for you to enter additional details. your new view will be associated with your workspace under **My Saved Views** in the navigation bar on the left.



## Folders

**Workspace manager** can organize runbooks in your workspace into meaningful collections.

You will find the Folder section in the workspace filter panel.

**If you are a workspace manager,** you can create new folders by using the “**+ Add new folder**” at the bottom of the folder section.

**Type in the name of the folder you want to create and press the enter key on your keyboard to confirm.**

To edit the folder, hover on top of the folder name and you should see the “Edit” icon on the right hand side.






# Runbook Overview


The screenshot shows a runbook titled "[Lotlux] - Recovery Plan [Jul 22] DR Failover". The interface includes a navigation bar with "Pages", "Dashboards", and "Tasks" (highlighted with callout 1). A search bar and "My tasks 41/41 tasks" are visible (callout 2). The main area displays a task list with a flow diagram. Callout 3 points to the view options: "List", "Nodemap", and "Table". Callout 4 points to the duration "0d 15:01:30" and a play button icon. The task list includes:

- #1 [Lotlux] TO START - Start Prep for Failover (23 Aug 21:00)
- #2 [Lotlux] Inform stakeholders application failover has started
- #3 [Lotlux] Check DB Connections (3m)
- #4 [Lotlux] Check DR Database (10m)
- #5 [Lotlux] Regional (3m)
- #6 [Lotlux] Confirm Application ready for shutdown (21:10)
- #7 [Lotlux] Shutdown Application Services (21:15)
- #8 [Lotlux] Shutdown Application UI (21:18)
- #9 [Lotlux] TO COMPLETE - Prep for Failover Complete (21:18)
- #10 [Lotlux] T1 START - Start Infra Failover

A "Continue to next page" button is overlaid on the task list.

## 1. Runbook name and details:

 **Runbook settings (runbook and task import, audit log...etc)**


 **Star runbook**, starred runbook will appear on the navigation bar on the left hand side for quick access.

## 2. Stream and runbook filters

## 3. Task views

## 4. Runbook duration & Start Runbook

In planning mode, this timing show you the expected duration of your runbook. In live or rehearsal, it displays the amount of time the runbooks has been running.

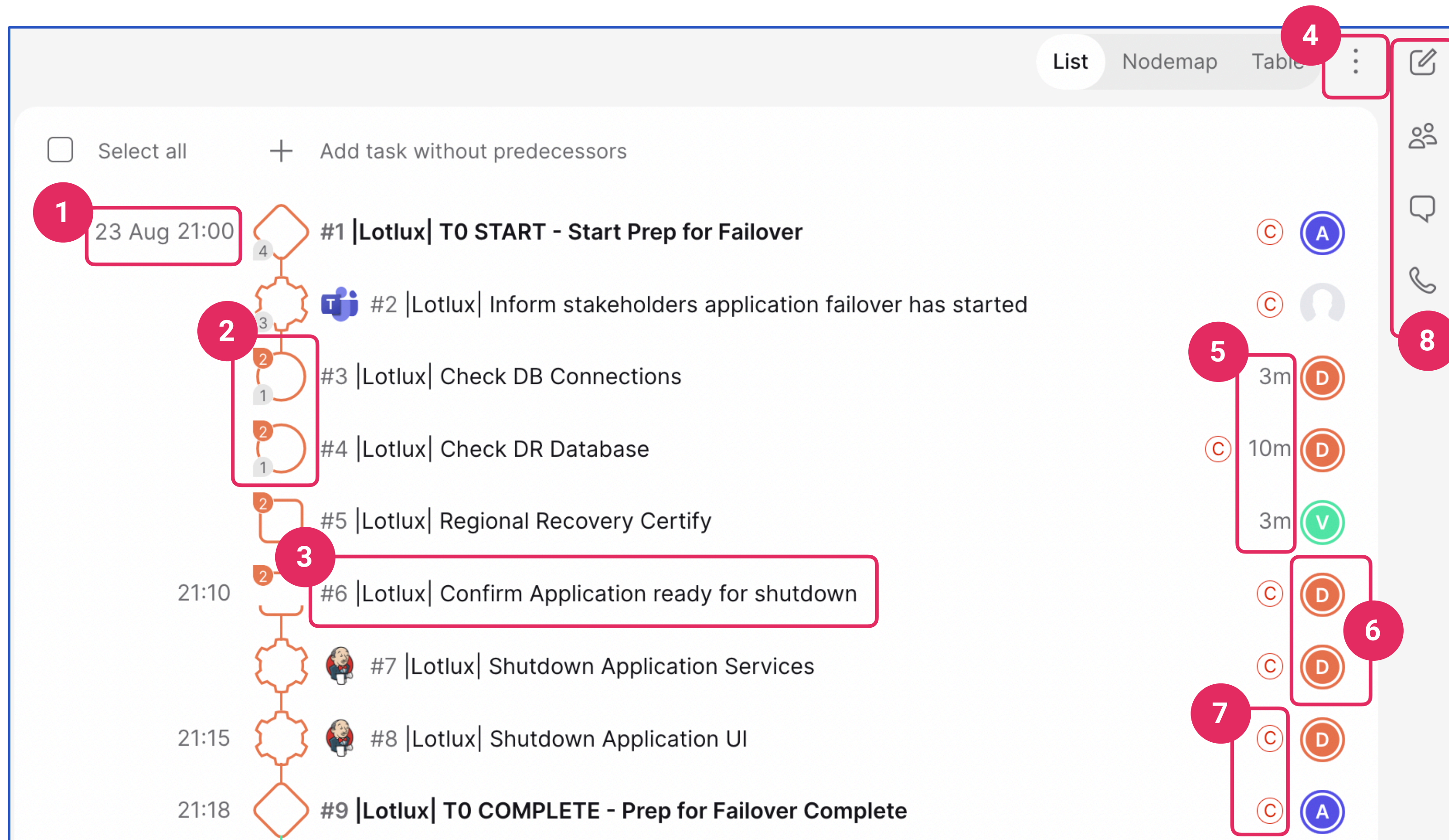
 **The icon** allows runbook admin start, pause and cancel for live and rehearsal runbooks.

*\* Depending on the role(s) you have been assigned to, some icons or features might not be available to you*





# Runbook Overview



1. Task start date and time

2. Task icon:

Icon shape = Task type

Icon colour = Assigned streams

3. Task ID and name (click on task name to view tasks details)

4. More options (task export, highlight mode)

5. Task duration

6. Assigned teams and users for task

7. Critical path (automated)

8. Runbook details

Runbook teams

Comments

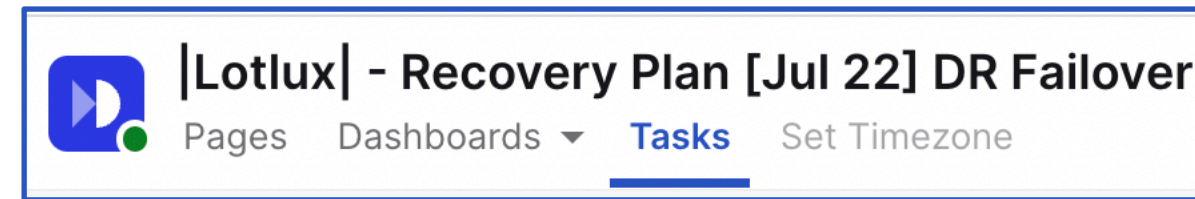
Adhoc comms

\* Depending on the role(s) you have been assigned to, some icons or features might not be available to you

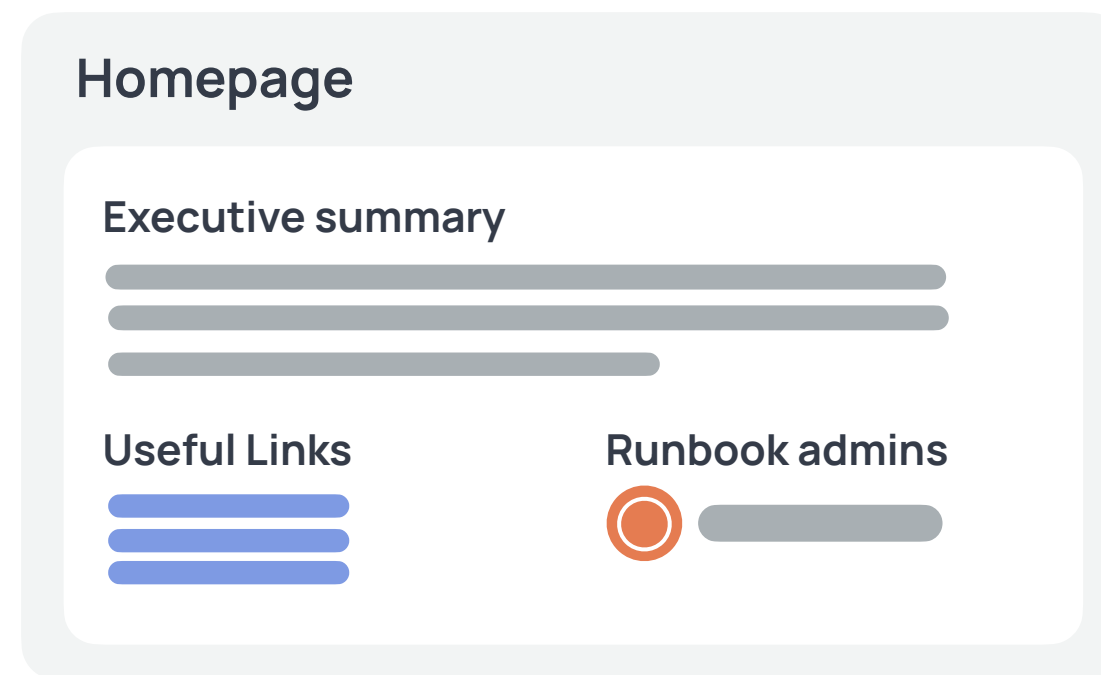




# Runbook Section



## Pages



The Runbook home page provides a space within the runbook where runbook admins can publish information regarding the runbook, can contain plain text, direct links, tables and even html

## Dashboards



The Runbook Dashboards section (Single-Runbook Dashboard) provides a real time reporting of the runbook and is available on all runbooks. It provides information such as task status summary, completion stages and milestone tasks overview

Please also see our additional slide on Single Runbook Dashboard for more information.

## Tasks



Display a list of tasks within the runbook. This is the default view when you first land in the workspace. You can change the way you view the list of runbooks using the "Task views" section.

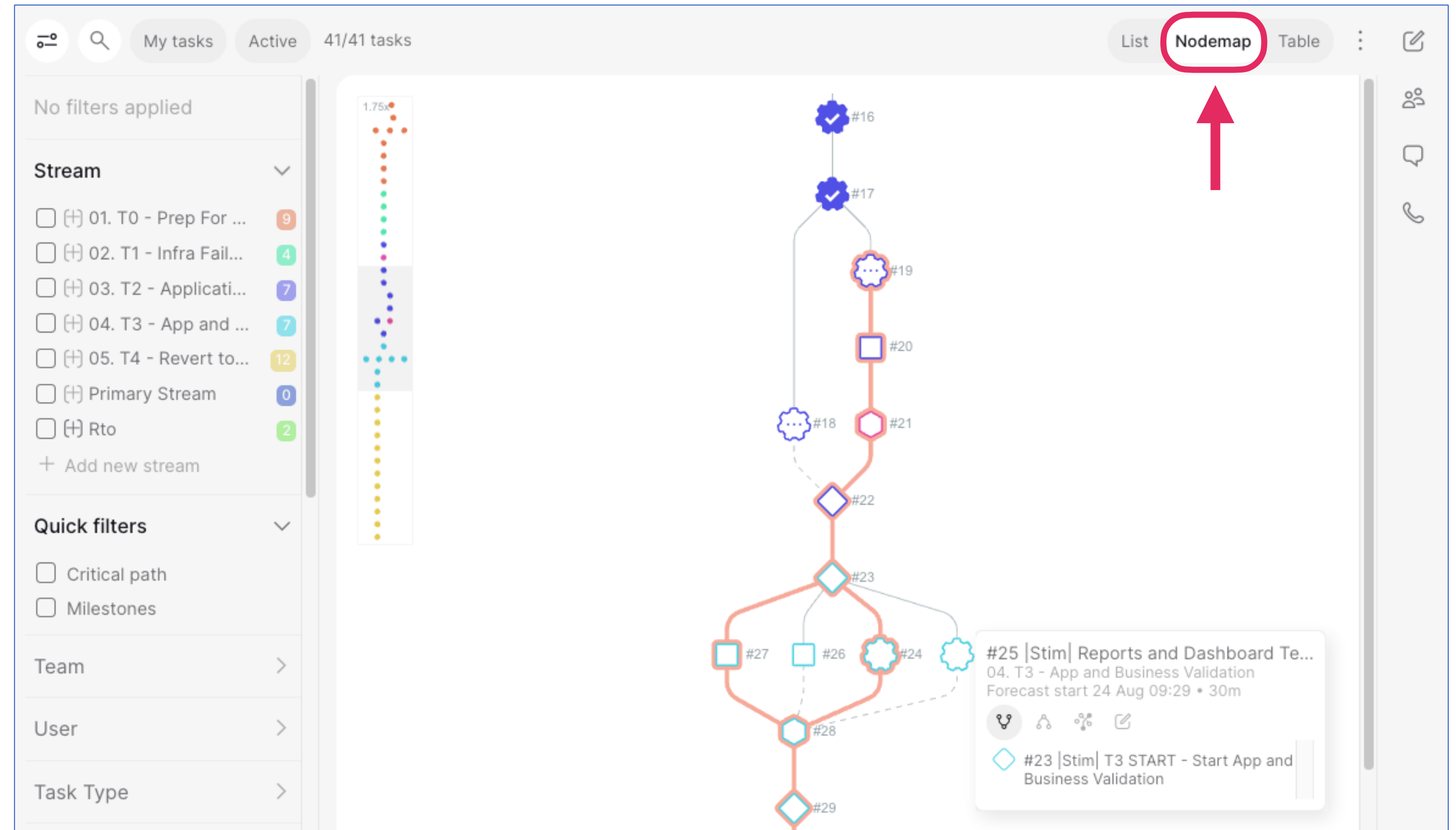
# Nodemap

**Nodemap** can be accessed via the within the Task views section on the top right.

It is a pictorial representation of your runbook and highlights the dependencies between tasks so you can see the flow of your runbook from start to finish.

This is an interactive nodemap enabling you to click on the individual nodes to bring up the task details. If you are an admin, you can edit the tasks in this view.

The orange line from top to bottom of the node map is the critical path which is automatically calculated for you.



\* for more information on [critical path](#) and node map, please visit our [In-App Help Centre resources](#)





# Streams, filters and Runbook teams

The screenshot displays the Runbook interface for a recovery plan. At the top, the title is "[Lotlux] - Recovery Plan [Jul 22] DR Failover". Below the title, there are navigation options: "Pages", "Dashboards", "Tasks", and "Set Timezone". The main area shows a task stream with tasks like "01. T0 - Prep For Fail...", "02. T1 - Infra Failover", etc. A "Stream" section on the left lists these tasks with checkboxes and colored indicators. A "Quick filters" section below it includes "Critical path" and "Milestones". On the right, a "Users and Teams" panel is open, showing a search bar and tabs for "Users (1)" and "Teams (4)".

**Streams are a logical way of grouping tasks and easily filtered by selecting the check box next to the stream name.**  
**A tasks color corresponds to the stream it is assigned to.**

**Filters allow you to see relevant tasks including tasks that are assigned to you, your team, or tasks that are late.**

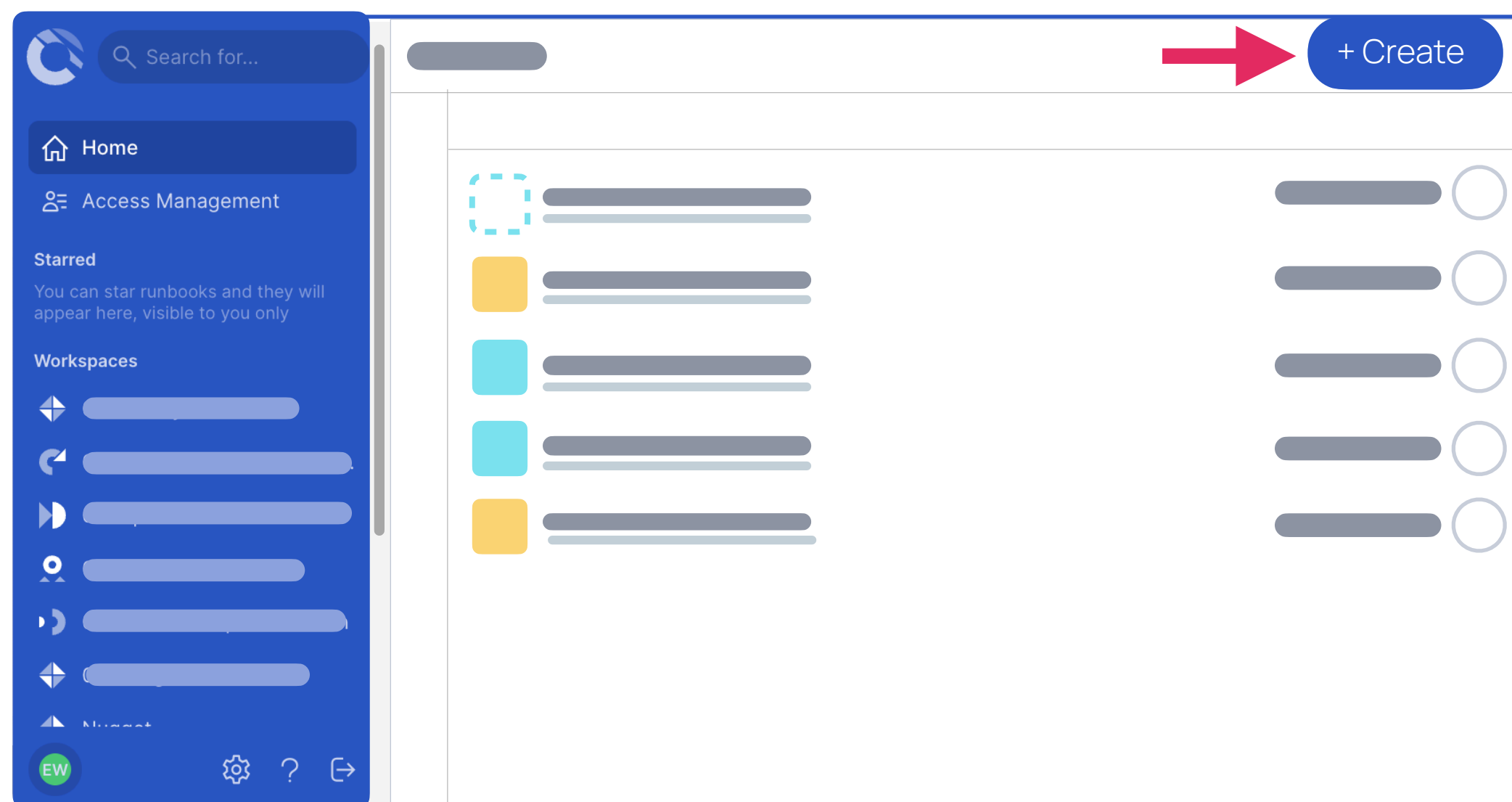
**Runbook teams are created by Runbook Admin. You can select each team to see the team members.**  
**Teams or individual users within a team can be assign to tasks.**  
**Multiple teams and users can be assigned to a single tasks.**

\* Depending on the role(s) you have been assigned to, some icons or features might not be available to you



# Create runbook (for Runbook Creator)

**01** To create a runbook, navigate to a workspace and click the **+ Create** icon at the top right of the screen



Please note, if you do not see the “+” icon but need to create runbooks, then contact your administrator to request additional permissions

**02** Complete the required information to set up the runbook and select **+ Create Runbook**

A screenshot of the 'New Runbook' form. The form has a title 'New Runbook' and a 'Create type' section with three radio buttons: 'New runbook' (selected), 'Use template', and 'Duplicate'. Below is a 'Title \*' field. There is a 'Scheduled Start' section with a calendar icon. The 'Runbook Type \*' section has two radio buttons: 'Normal' and 'Validation' (selected). At the bottom, there is a 'Show advanced options' link, a 'CANCEL' button, and a '+ CREATE RUNBOOK' button.

Your new runbook will automatically open, simply start adding tasks, create runbook teams, map dependencies, assign tasks and edit details.

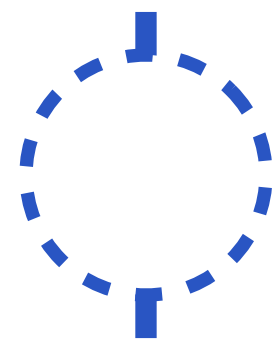
*\* Depending on the role(s) you have been assigned to, some icons or features might not be available to you*



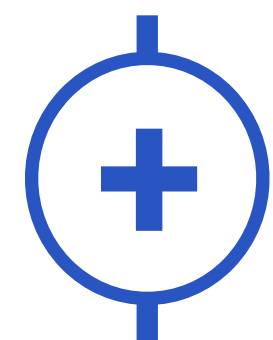


# Create and edit tasks (for Runbook admins)

## Add a new task



To start adding your first tasks to a new runbook, input the task title next to the icon and then hit Enter to confirm. You can then edit the details by clicking on the task title.



If you already have an existing task and you want to add a successor task, click on the + inside the existing task icon, input the task title and hit Enter to confirm.



### Add tasks without predecessors

To add tasks without predecessors, the option will be available at the top of your task list, click on the “**add tasks without predecessors**” and input the title and details.

## Edit a task



To edit existing tasks, selecting the task title will automatically opens the Task edit pane to the right of the task list.

Here you can edit task details, such as, title, type, stream, duration, assign teams and users and dependencies.

Selecting the task again collapses the panel.

Updated details need to be saved once completed using the “Save” button, which will only appear once details have been changed.

Task #1

Title \*  
Go/No go decision

Task Type \*  
Normal

Stream \*  
Primary Stream

Level  
 Level 1  Level 2  Level 3

Forecast start  
Tue, 2 Nov 2021 10 : 00 ?

Duration  
🕒 0 days 1 hrs 0 mins 0 secs

Forecast finish  
Tue, 2 Nov 2021 11 : 00 ?

Add a fixed start time?

**i** Description >

**👤** Assigned Users & Tea... >

**🔗** Dependencies >

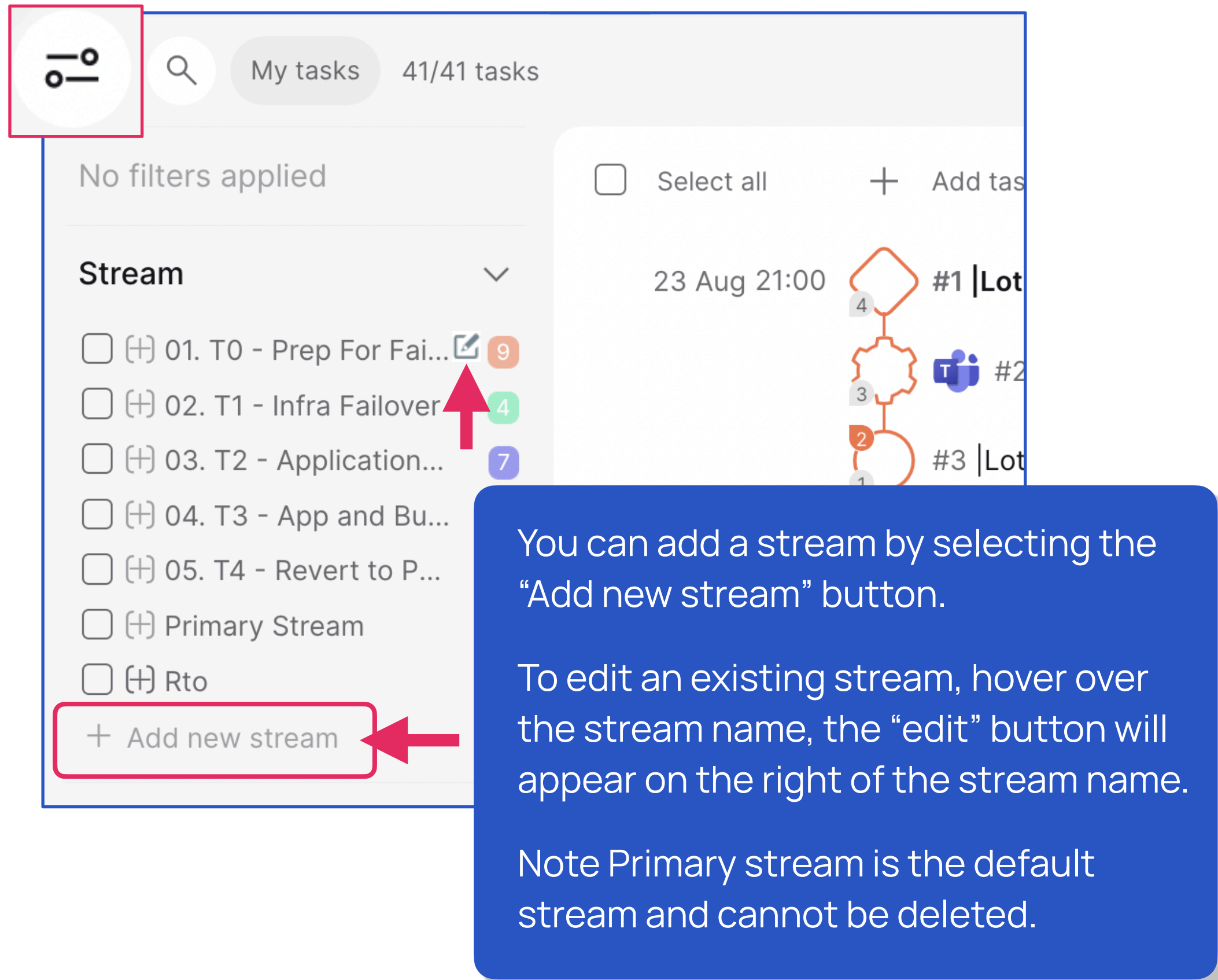
*\* for more information on available task type and details, please visit our In-App Help Centre resources*





# Edit Streams and Runbook teams (for Runbook admins)

**Streams** can be applied to a task within the **Task Edit** menu by clicking on the task title in your task list



No filters applied

Select all + Add task

23 Aug 21:00 #1 |Lot

Stream

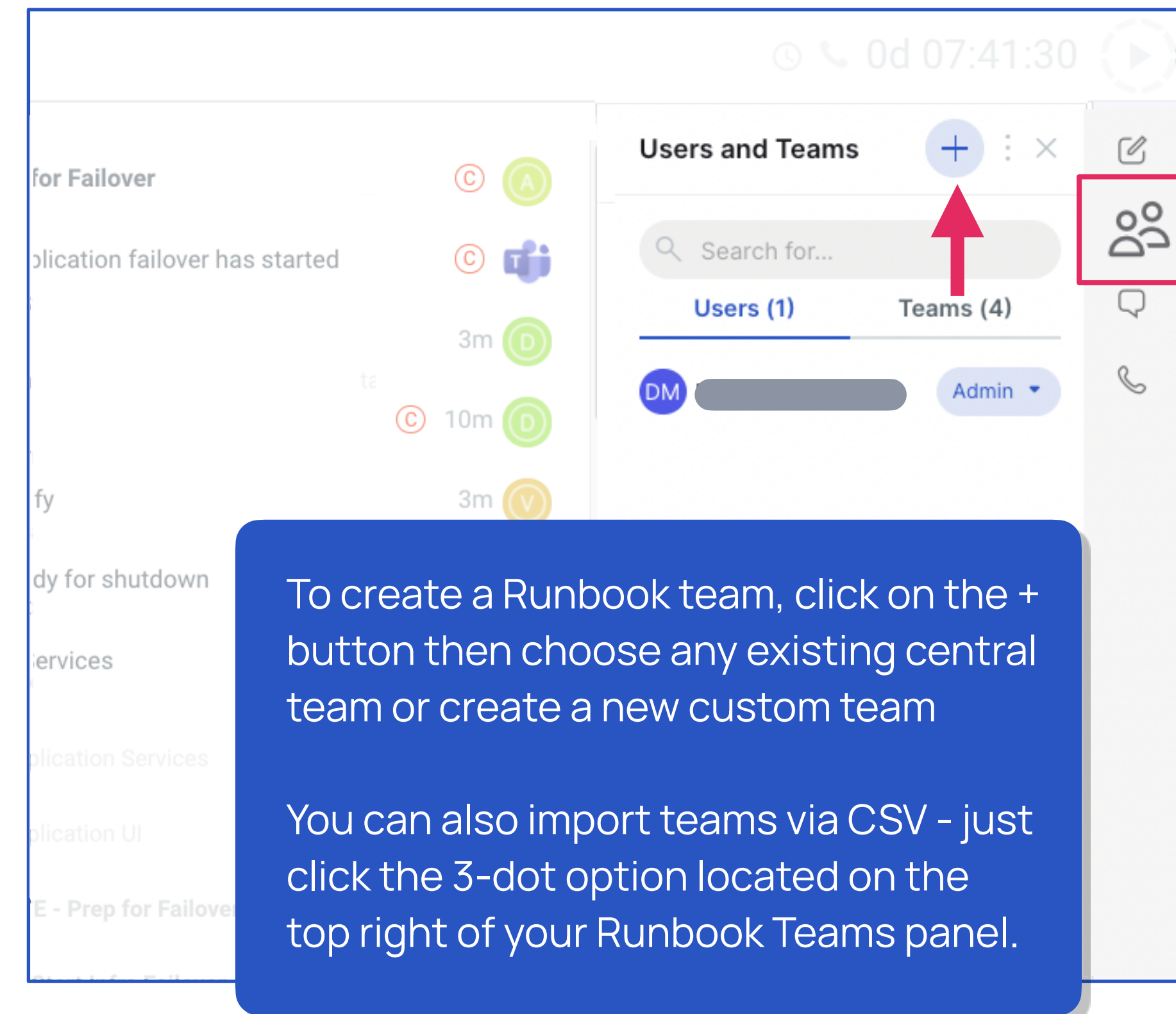
- (+) 01. T0 - Prep For Fai... 9
- (+) 02. T1 - Infra Failover 4
- (+) 03. T2 - Application... 7
- (+) 04. T3 - App and Bu...
- (+) 05. T4 - Revert to P...
- (+) Primary Stream
- (+) Rto
- + Add new stream

You can add a stream by selecting the “Add new stream” button.

To edit an existing stream, hover over the stream name, the “edit” button will appear on the right of the stream name.

Note Primary stream is the default stream and cannot be deleted.

**Runbook Teams** are required to be set up before you can assign any tasks to a team or user



0d 07:41:30

Users and Teams +

Search for...

Users (1) Teams (4)

DM Admin

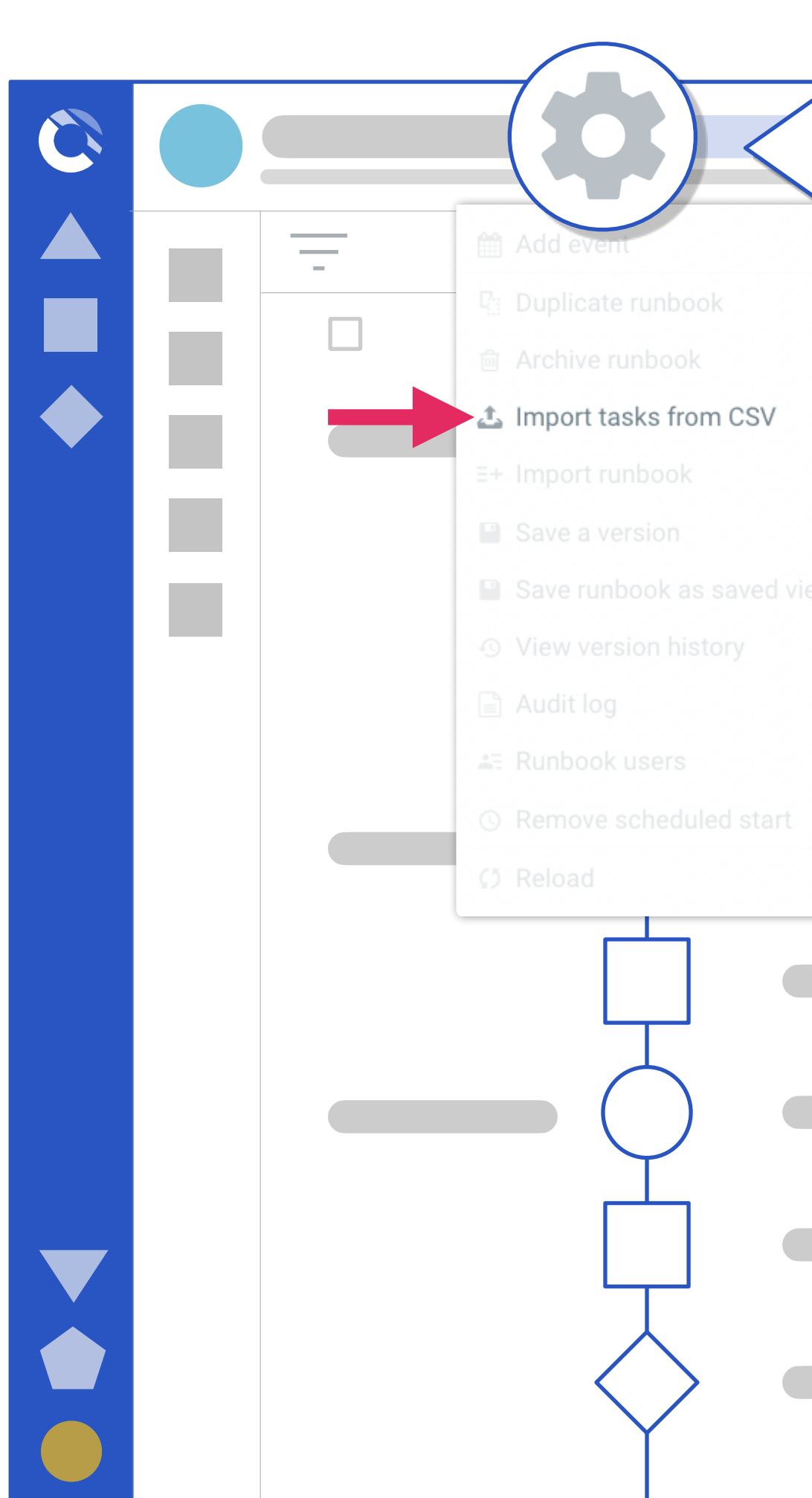
To create a Runbook team, click on the + button then choose any existing central team or create a new custom team

You can also import teams via CSV - just click the 3-dot option located on the top right of your Runbook Teams panel.

**For more details on Runbook teams features, please visit our Help Centre**



# Import and export tasks



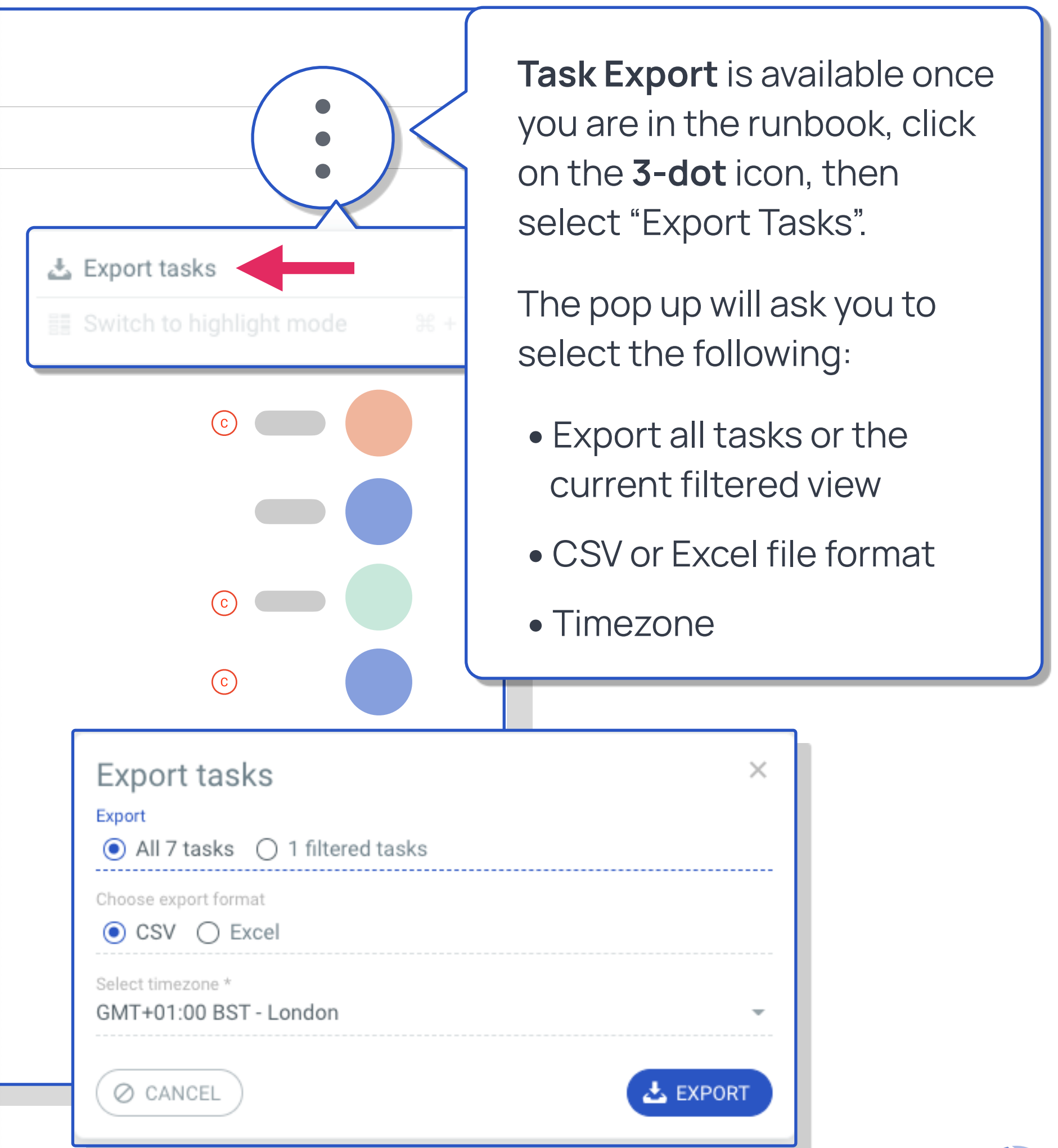
**Task Import via CSV upload** is located in the Settings icon next to your runbook name. Only the Runbook Admin can upload tasks.

Before you can import tasks, you will need to either:

- Create a new blank runbook
- or
- Append tasks to an existing runbook

It is not possible to reference an existing task as a predecessor from one of the tasks in the CSV that you are importing.

There are required fields for the CSV upload and there is an upload template available. Please speak to the Cutover team if you need assistance.



**Task Export** is available once you are in the runbook, click on the **3-dot** icon, then select "Export Tasks".

The pop up will ask you to select the following:

- Export all tasks or the current filtered view
- CSV or Excel file format
- Timezone

The 'Export tasks' dialog box shows the following options:

- Export:  All 7 tasks  1 filtered tasks
- Choose export format:  CSV  Excel
- Select timezone \*: GMT+01:00 BST - London
- Buttons: CANCEL, EXPORT

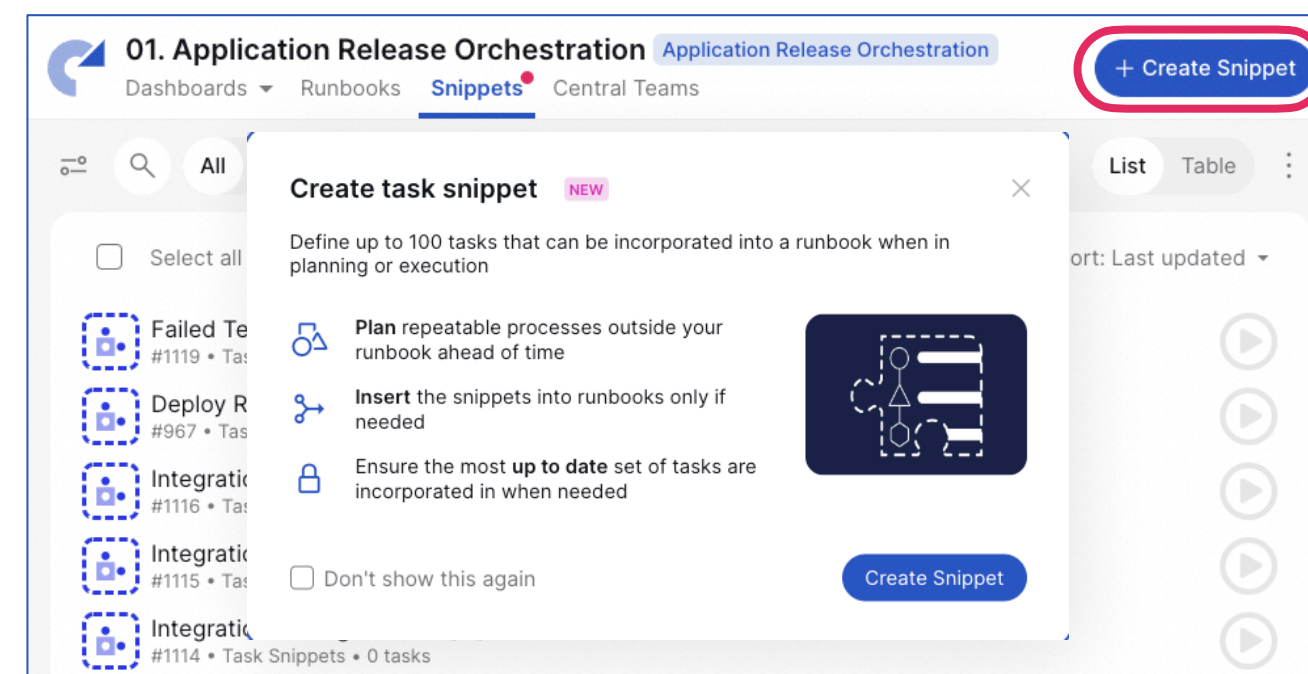




# Snippets

Snippets are a predefined set of repeatable tasks created and approved by **Workspace Runbook Creators** that can be easily appended anywhere into existing runbooks by **Runbook admins**. Snippet tasks can be identified by clicking the filter icon within your runbook

## Create Snippets

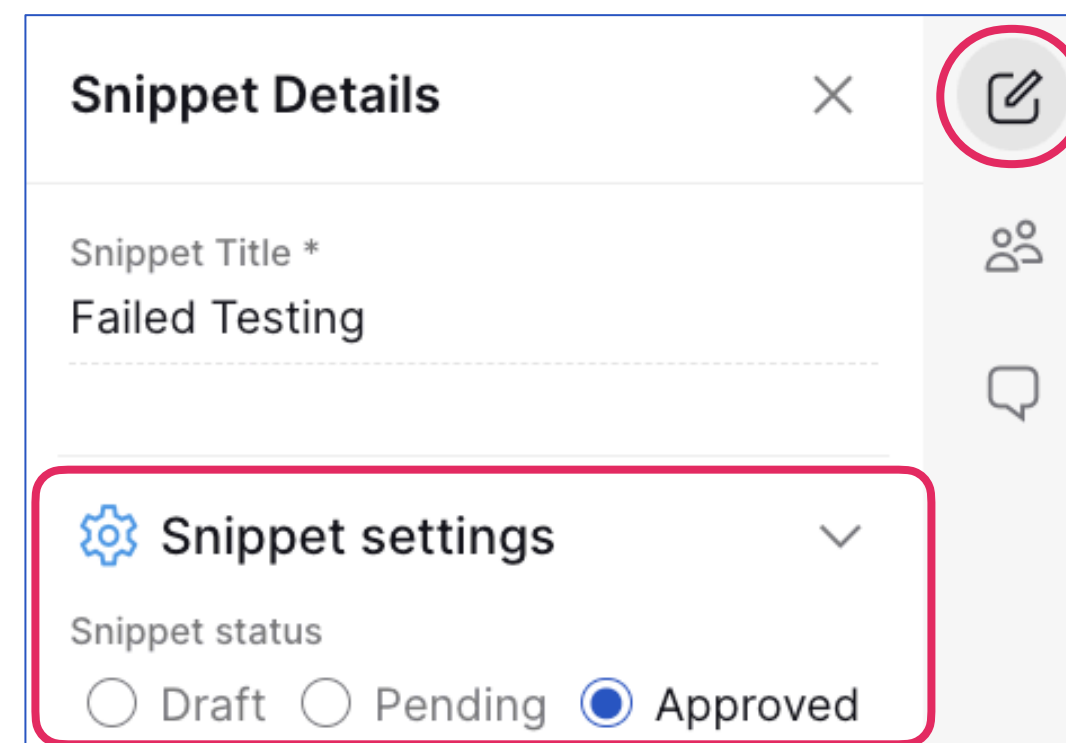


To create a snippet, click the Snippets tab in your workspace. Next, click the **+ Create Snippet** button on the upper right-hand corner of the screen.

You have the ability to add up to 100 tasks.

**Adding details for task in snippets follows the same process for creating tasks.**

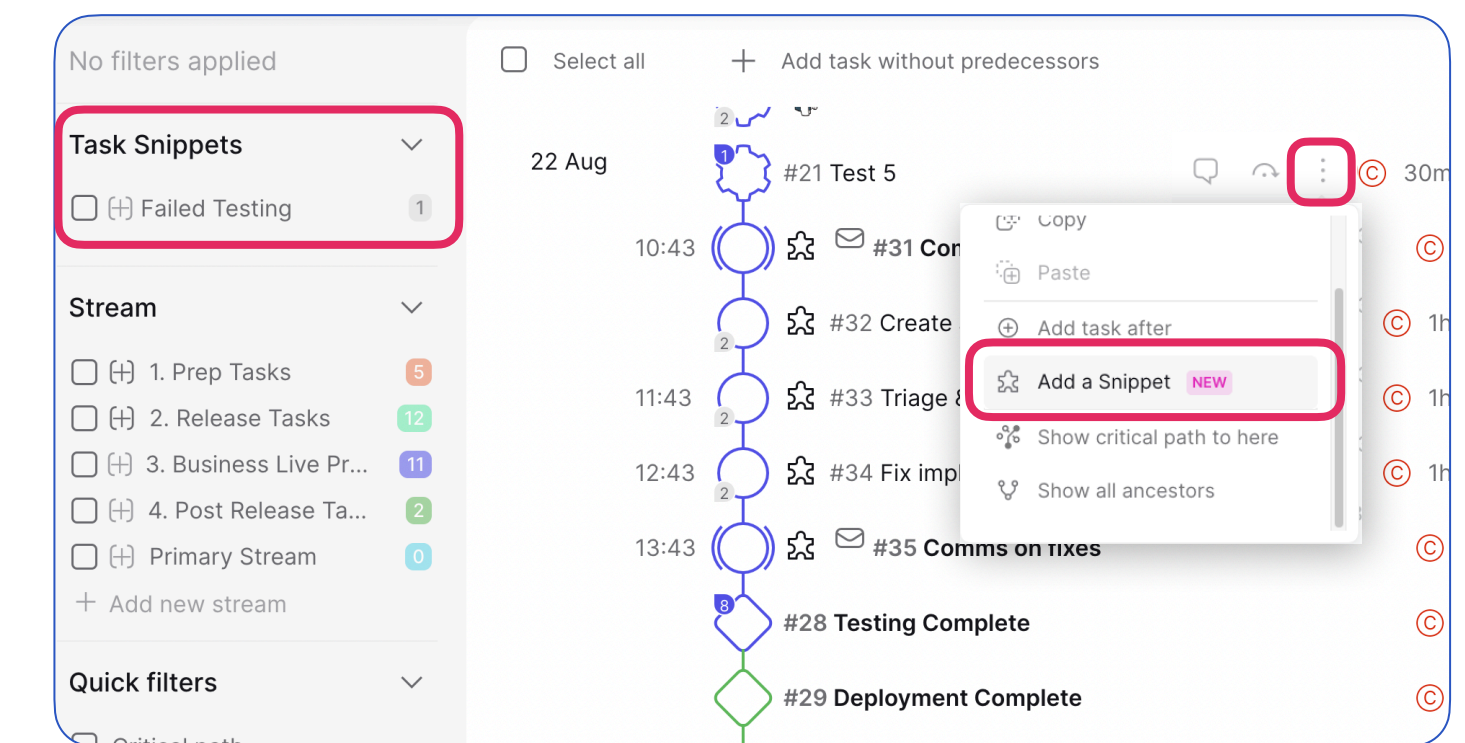
## Approve Snippets



**Snippets will need to be marked as approved in order for it to become available for use in your runbook.**

To approve your snippet, click the Snippet Details icon in the upper right-hand corner of the screen then click **Approved** under **Snippet settings**.

## Add Snippets to tasks



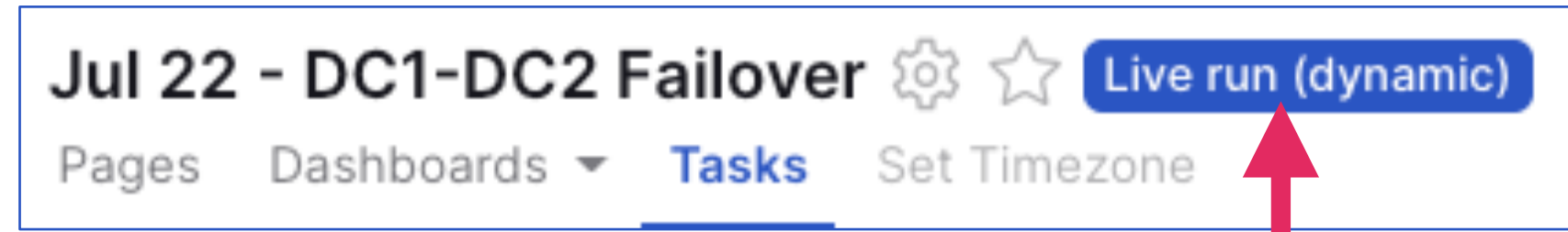
To add your snippet to a task, simply click the three vertical dots on the task you want your snippet to be the successor of.

In the pop-up modal, click Add. Afterward, your task snippet will be added to your runbook





# Start runbooks



The pill label located on the right hand side of your runbook name (as shown in the images above) indicates what mode your runbook is in:

**Rehearsal** can be executed as many time as you wish, this helps administrators identify any changes needed prior to the live event and enables all participants to familiarise with the runbook.

**Live** mode puts the runbook in live execution, which means you can no longer change any task details once the task has been completed.

[Lotlux] - Recovery Plan [Jul 22] DR Failover ⚙️ ☆ 0d 15:01:30

Pages Dashboards ▾ **Tasks** Set Timezone

My tasks 41/41 tasks List Nodemap Table

No filters applied

Stream

- (+) 01. T0 - Prep For Fai... 9
- (+) 02. T1 - Infra Failover 4
- (+) 03. T2 - Application... 7
- (+) 04. T3 - App and Bu... 7
- (+) 05. T4 - Revert to P... 12
- (+) Primary Stream 0
- (+) Rto 2
- + Add new stream

Quick filters

- Critical path

23 Aug 21:00

- #1 [Lotlux] TO START - Start Prep for
- #2 [Lotlux] Inform stakeholders a
- #3 [Lotlux] Check DB Connections
- #4 [Lotlux] Check DR Database
- #5 [Lotlux] Regional Recovery Certify 3m ✓
- #6 [Lotlux] Confirm Application ready for shutdown
- #7 [Lotlux] Shutdown Application Services
- #8 [Lotlux] Sh

**Runbook Start**

Your runbook passed 0 / 5 validation checks [show details](#)

Run Type

Rehearsal  Live

Communication Settings

Off  Test Comms only  On

Rebaseline the start of the runbook to the current time?

To execute a runbook, click the play icon located at the top right.

\*Only Runbook administrators will be able to put a runbook into execution.

Once you clicked the play icon, you are required to define the type of run you wish to execute,


**Rehearsal or Live**

Communication settings can also be turned on or off for the sending of email and SMS messages. If 'Test Comms only' is selected, the messages are sent to the Runbook admins only.





# Execute tasks

During execution, the task icons will change and the timer will be running. This records your actual durations. **The Runbook Admins can pause or cancel the runbook from the same icon.** Selecting the  icon allows changes to be made to the Communication settings.



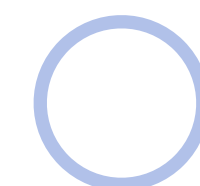
**Startable tasks** will have a visible play icon within the task. Only the team allocated to the task will be able to interact with it, all other users will be able to see the task but not start it. **Click on the play icon to start the task.**



When there is a Started or **in progress task**, the icon changes to a dashed tick. The actual start time is captured and the start times for subsequent tasks is reforecast. **in-progress tasks can be finished by clicking on the icon.**



**A Completed task** displays a bold tick. At the point of completion the actual completion time is captured and the start times of subsequent tasks are reforecast, 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.

0d 00:00:16

Pages Dashboards Tasks Set Timezone

My tasks Active 41/41 tasks List Nodemap Table

Select all + Add task without predecessors

25 Aug 20:38 #1 | Keylex-Viva | TO START - Start Prep for Failover

#2 | Keylex-Viva | Inform stakeholders application failover has started

#3 | Keylex-Viva | Check DB Connections 3m

#4 | Keylex-Viva | Check DR Database 10m

#5 | Keylex-Viva | Regional Recovery Certify 3m

**Paused for editing**

**This Runbook is cancelled. The Runbook must be duplicated in order to be used again**

## Paused for editing

When a run is paused, it returns to planning mode, completed tasks are locked and the timings are retained. Any tasks that have not yet been run can be edited and new tasks can be added to the runbook as required. The run can be resumed at any point.

## This Runbook is cancelled. The Runbook must be duplicated in order to be used again

When you cancel a live run, a red notification message appears along the bottom of the runbook. Should the user want to use the runbook again they must duplicate the runbook.

\* A Runbook Administrator can override users to start and complete tasks





# Automated Notifications

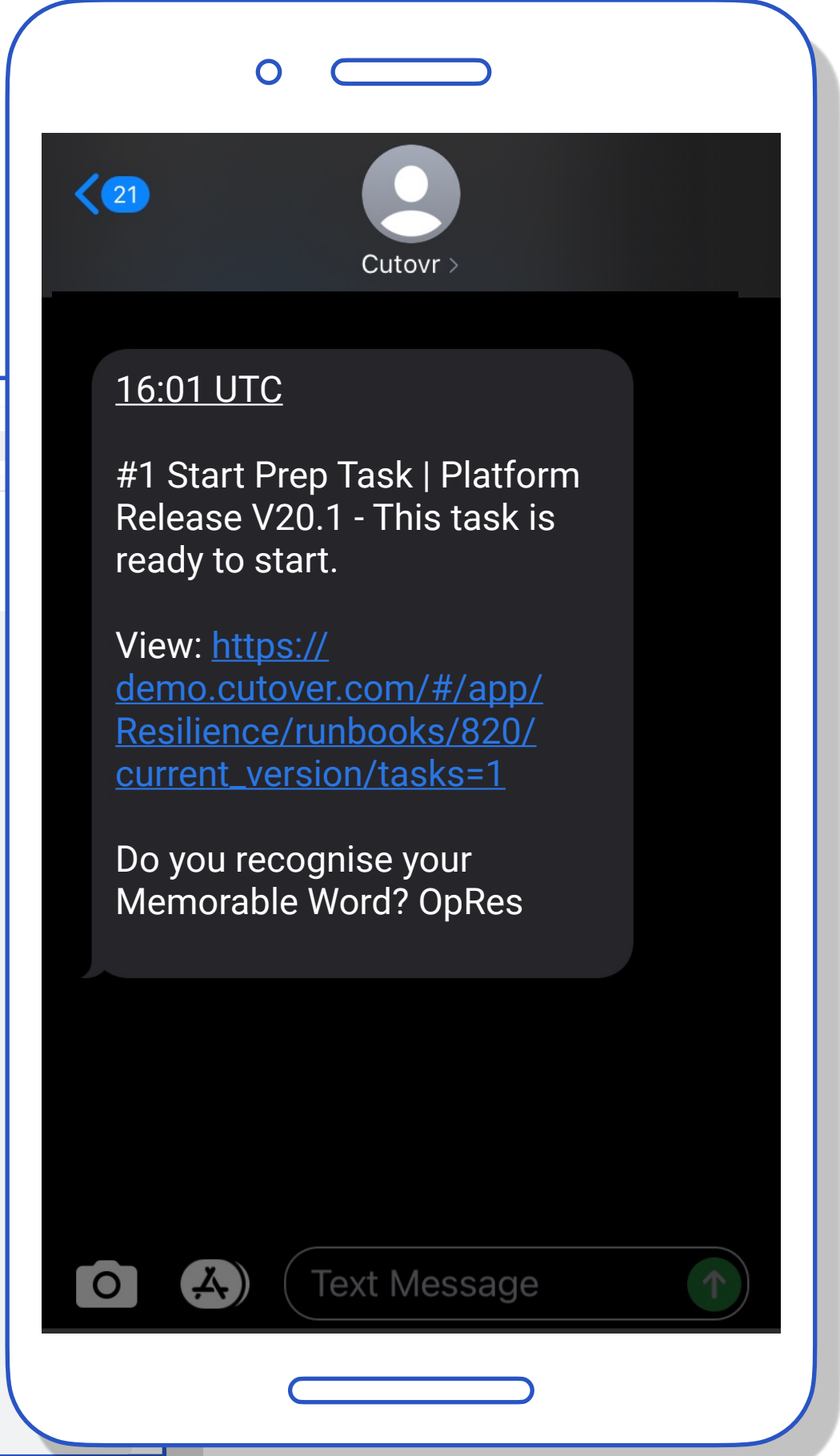
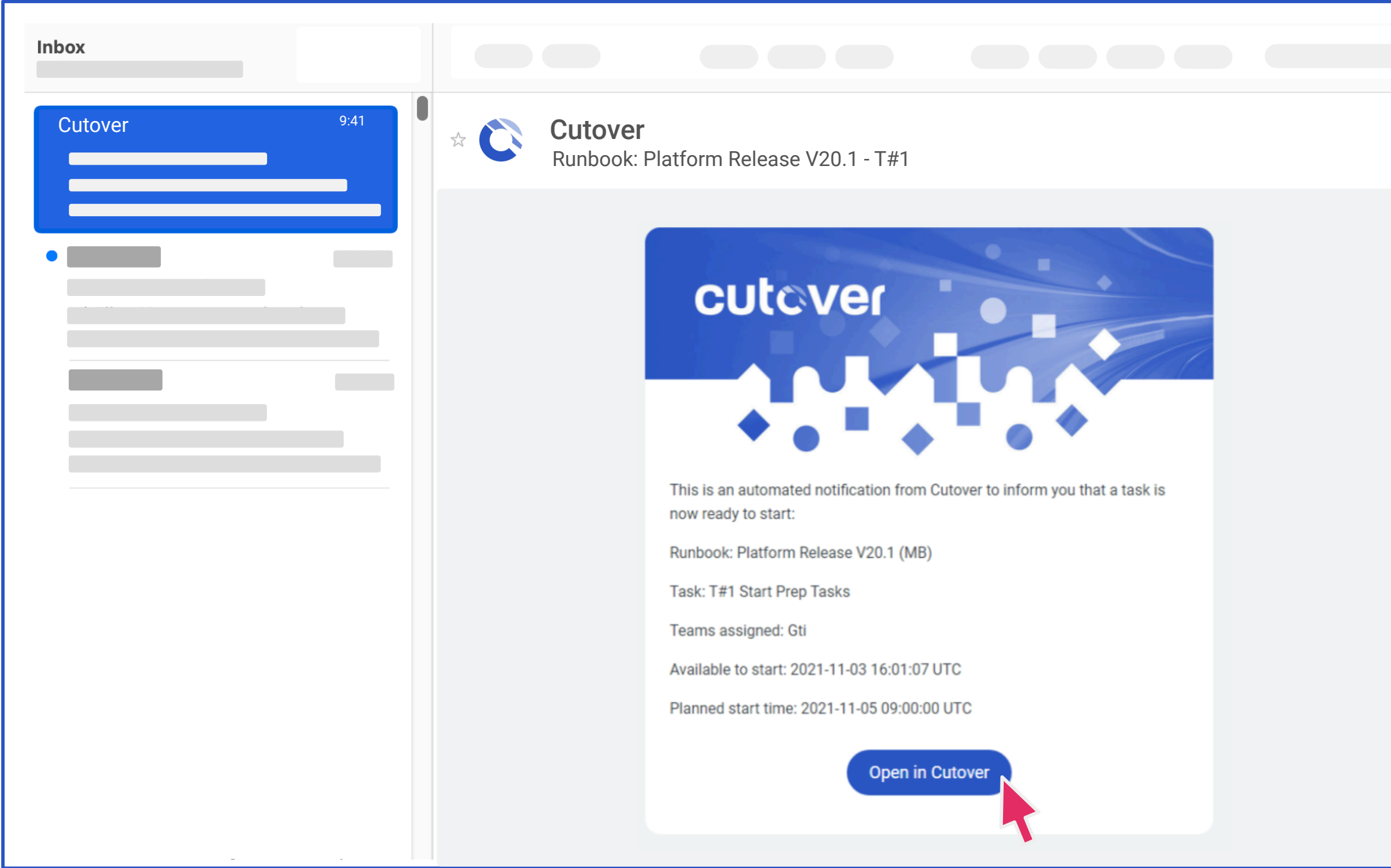
Once the runbook has been started by the Admin and they have turned on the communications options for all participants, notifications will be sent to inform the assigned team(s) or user(s) when a predecessor task has been completed and the assigned task has become startable as a result.



Automated notifications will be sent to the registered email address.

An SMS will only be sent if the mobile number is available. It can be added via the user profile icon located at the bottom left hand side of the page.

You should see the “Memorable Word” you have set up being quoted at the end of the SMS message for authentication purposes.

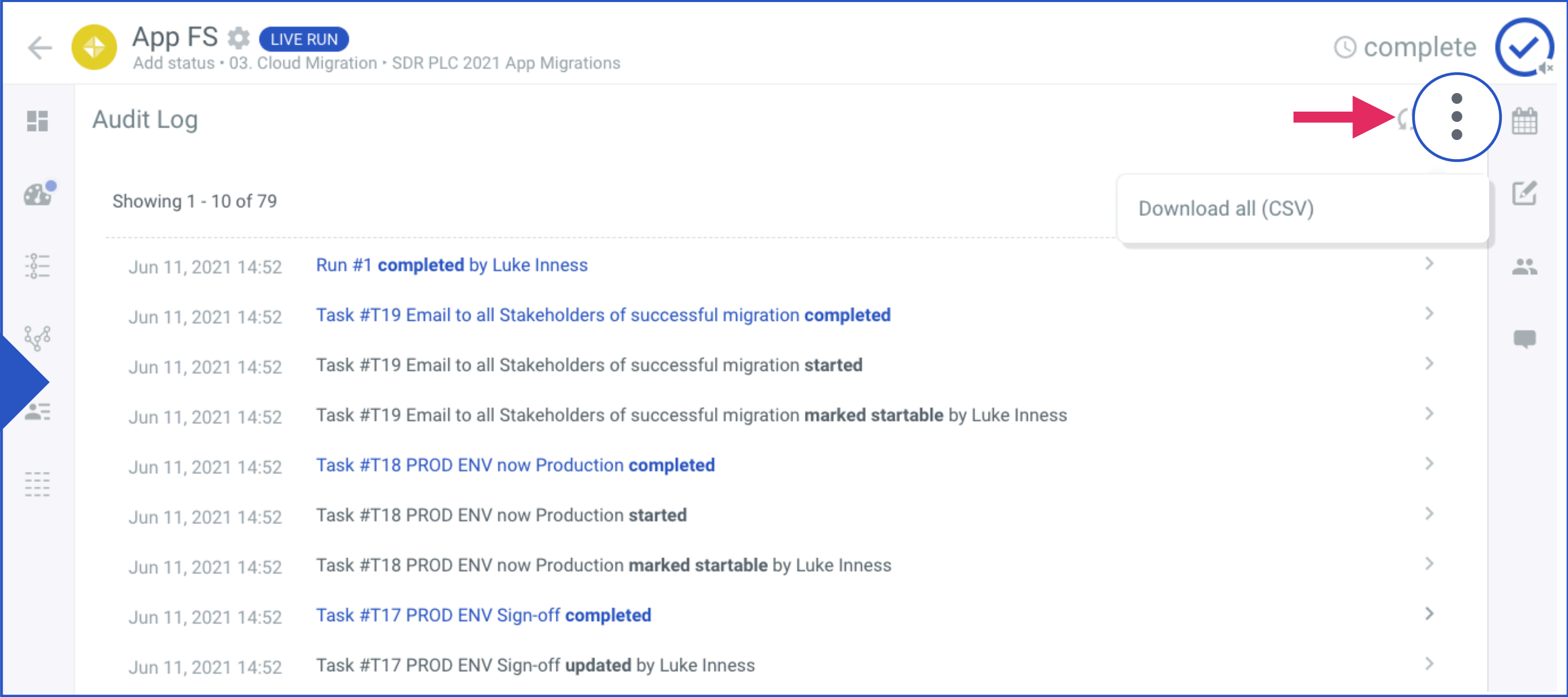
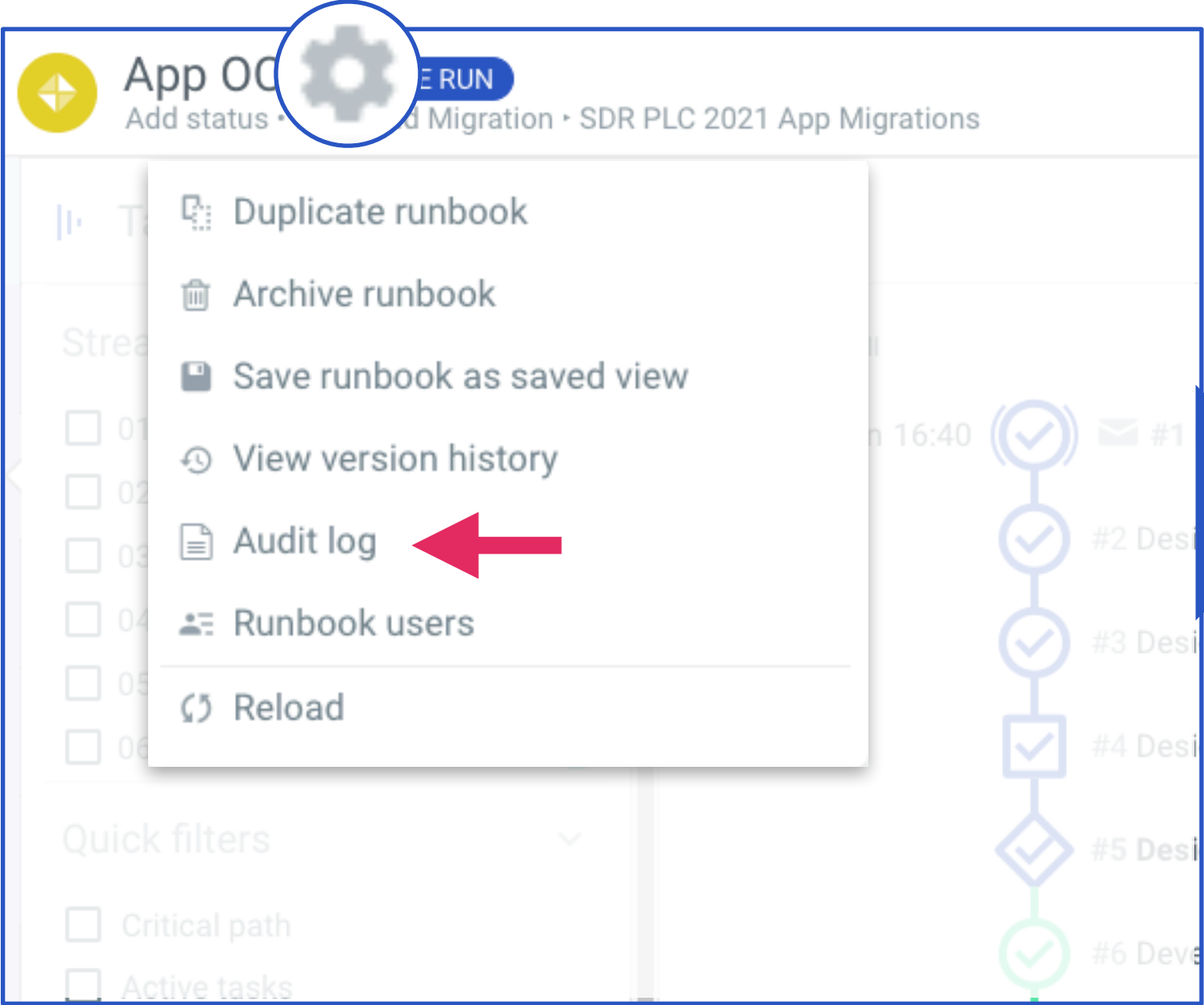


# Audit log

To access the audit log, click on the **runbook settings icon** and choose the **audit log** option.

Once you are in the audit log screen, you can download the entire log as CSV via the 3-dot option located on the top right hand side

The audit log displays all actions and timings related to the runbook such as any amendments to the runbook details, streams or teams, in addition to any changes to individual tasks.



# Single Runbook Dashboard

Single Runbook Dashboard can be found within each individual runbook under the Runbook Section. Simply select the 'Dashboard' to see the dashboard page.

It provides a real-time status of a runbook and is visible to all users who have access to the runbook. As tasks are updating in your runbook, the dashboard will update instantly without the need to refresh your screen.

The screenshot shows the dashboard for a runbook titled "[Lotlux] - Recovery Plan [Jul 22] DR Failover". The interface includes a navigation bar with "Pages", "Dashboards" (highlighted with a red box and arrow), and "Tasks". Below the navigation, there is a search bar and a "My tasks" button showing 41 tasks. The main content area displays a stream of tasks with checkboxes and progress indicators. The tasks listed are:

- 01. T0 - Prep For Fai... (9 tasks)
- 02. T1 - Infra Failover (4 tasks)
- 03. T2 - Application... (7 tasks)
- 04. T3 - App and Bu... (7 tasks)

The dashboard provides a comprehensive overview of task completion. Key metrics include:

- TASK COMPLETION SUMMARY:**
  - START: 05:01 (18 Jan 2022) +31m 6s
  - FINISH: 02:06 (22 Jan 2022) +3d 1h
  - DURATION: 3d 21:05
- COMPLETION BY STAGE:**
  - 37% completion rate (indicated by a donut chart).
  - 0 Skipped, 0 Abandoned, 223 Complete, 377 Running late, 0 On track.
- Task Status Table:**

Status	Total	Late
Complete	223	-
In Progress	2	2
Startable	12	12
Not yet startable	363	363
<b>Totals</b>	<b>600</b>	<b>377</b>
- TASK COMPLETION OVER TIME:** A line graph showing the number of tasks completed over time, with a shaded area indicating the current task completion rate.
- STREAM SUMMARY:**

Title	Progress	Start	Finish	Duration
01. T0 - Prep For Failover	111 / 139	18 Jan 05:01 +31m 6s	21 Jan 17:11 +3d 1h	3d 12h
02. T1 - Infra Failover	45 / 58	18 Jan 06:22 +34m 54s	21 Jan 17:19 +3d 1h	3d 10h
03. T2 - Application Failover	55 / 98	18 Jan 07:38 +1h 42m	21 Jan 23:21 +3d 1h	3d 15h
- MILESTONE TASKS LIST:**

Title	Finish
Start DC Recovery #616 Stream: 01. T0 - Prep For Failover	18 Jan 05:01 +31m 6s
Start Recovery steps for Wealth Enterprise #629 Stream: 01. T0 - Prep For Failover	18 Jan 05:01 +31m 8s





# Multi-Runbook Dashboard

Your workspace dashboard is located within the workspace section. Select 'Dashboard' to see the Multi Runbook Dashboard.

It provides a real-time status of all your runbooks in one view. It is visible to all users who have access to the workspace. You can use the filter panel to select a particular group of runbooks in the Multi-Runbook Dashboard view.



1. **Filters** can be applied to narrow down the selection of runbooks you would like to see in one dashboard view.

2. **Share** the Multi-Runbook Dashboard via the schedule email icon located at the top right hand side of the dashboard.

The screenshot shows the '02. Operational Resilience' workspace dashboard. The 'Dashboards' menu is highlighted with a red box and an arrow pointing to it, labeled with a red '1'. Below the menu, there are tabs for 'All', 'Templates', and 'Snippets'. A filter panel on the left shows '1 filter applied' and a list of folders including 'BCM', 'Cyber Security', and 'Default'. The main area displays a list of runbooks, such as 'CHG- AAP Recovery Plan [A]' and 'CHG- DGet Recovery Plan [A]', each with a status indicator and a count.

The screenshot shows the dashboard view with various charts and a 'Schedule Email' dialog box. The dashboard includes a 'Folders' list on the left, a 'RUNBOOK STAGE SUMMARY' chart showing 15 items, a 'TASK STAGE SUMMARY' chart showing 1.2k items, a 'RAG STATUS' chart showing 15 items, and a 'LATENESS, BY RUNBOOK' chart showing 15 items. The 'Schedule Email' dialog box is open on the right, with a red box and arrow pointing to it, labeled with a red '2'. The dialog box contains fields for 'Schedule details', 'Repeat frequency', 'Sends at', 'Recipient Users and Teams', and 'Email content'. A '+ CREATE SCHEDULE' button is visible at the bottom of the dialog.



# Post Implementation Review (PIR)

After the completion of a runbook, the PIR dashboard provides you with a clear picture of how a runbook has performed, teams can evaluate whether objectives were met, how effectively a program was executed, and see actions required to improve the next program or initiative.

Only the admins can see the “View Post-Implementation Review Report” banner at the bottom of the runbook page to access the PIR. They can select “Publish” in the top right to share with others and save the PIR as an additional dashboard view for all.

Timeline of runbook tasks:

- 05:53 #81 [Bigtax] Confirm Application ready for shutdown
- 07:16 #300 [Shoplist] Confirm Application UI is available **Test result: Pass**
- 07:00 #251 [Namfix] Confirm DR Database is online and ready **Build status: successful**
- 07:23 #314 [Shoplist] RTO End
- 07:25 #316 [Ytrap] T2 COMPLETE - Application Failover Complete
- 07:26 #306 [Keylex] RTO End
- 07:27 #337 [Ytrap] T3 START - Start App and Business Validation  
#23 in Ytrap Recovery Plan - 04. T3 - App and Business Validation - Started 17m 2s late
- #367 [Ytrap] Account Reconciliation Testing

Bottom banner: **Live run is complete** | [View Post-Implementation Review Report](#)

**DC1 to DC2 Failover Complete** (LIVE RUN) | complete

Post-Implementation Review (598/598) **PUBLISH**

**OVERALL TIMINGS**

START	FINISH	DURATION
4 Dec 12:29 - 14s	5 Dec 02:59 - 5h 39m	14h 30m - 5h 39m

**RUNBOOK SUMMARY**

End to end Failover for the Chicago DC Test completed earlier than planned. This was down to a number of overrunning tasks within the Hoot Suite failover steps. Follow up actions to be addressed post event. Hoot Suite Failover steps to be assessed and possibly re-baselined if not accurate. Salesforce application failover steps completed ahead of schedule. Steps to be accessed and possibly re-baselined to shorter times if required.

**EXECUTION SUMMARY**

A full end to end recovery of the Chicago Data Centre was conducted on March 23rd. Over all failover and fallback attempts were deemed a success however there are some key areas to address namely improvement in accurate planning to ensure we drive efficiencies. Root cause analysis also needs to be conducted on some applications planned RTOs vs actual RTOs.

**USER PARTICIPATION**

Total Involved	Viewed Runbook	Performed an action
2	0	0

**LATENESS, BY TASK**

224 On time	72 Less than 1.0h late	68 More than 1.0h late	234 Others
-------------	------------------------	------------------------	------------

**PERFORMANCE VS PLANNED, BY STREAM**

Stream	Planned	Actual
05. T4 - Revert to Primary Location	1d 33m 30s	1d 5h 28m 16s +4h 54m 46s
01. T0 - Prep For Failover	16h 32m	13h 11m 6s -3h 20m 54s
03. T2 - Application Failover	2d 2h 5m	1d 12h 17m 50s -13h 47m 10s
and Business Validation	1d 14h 30m	14h 47m 55s -23h 42m 5s



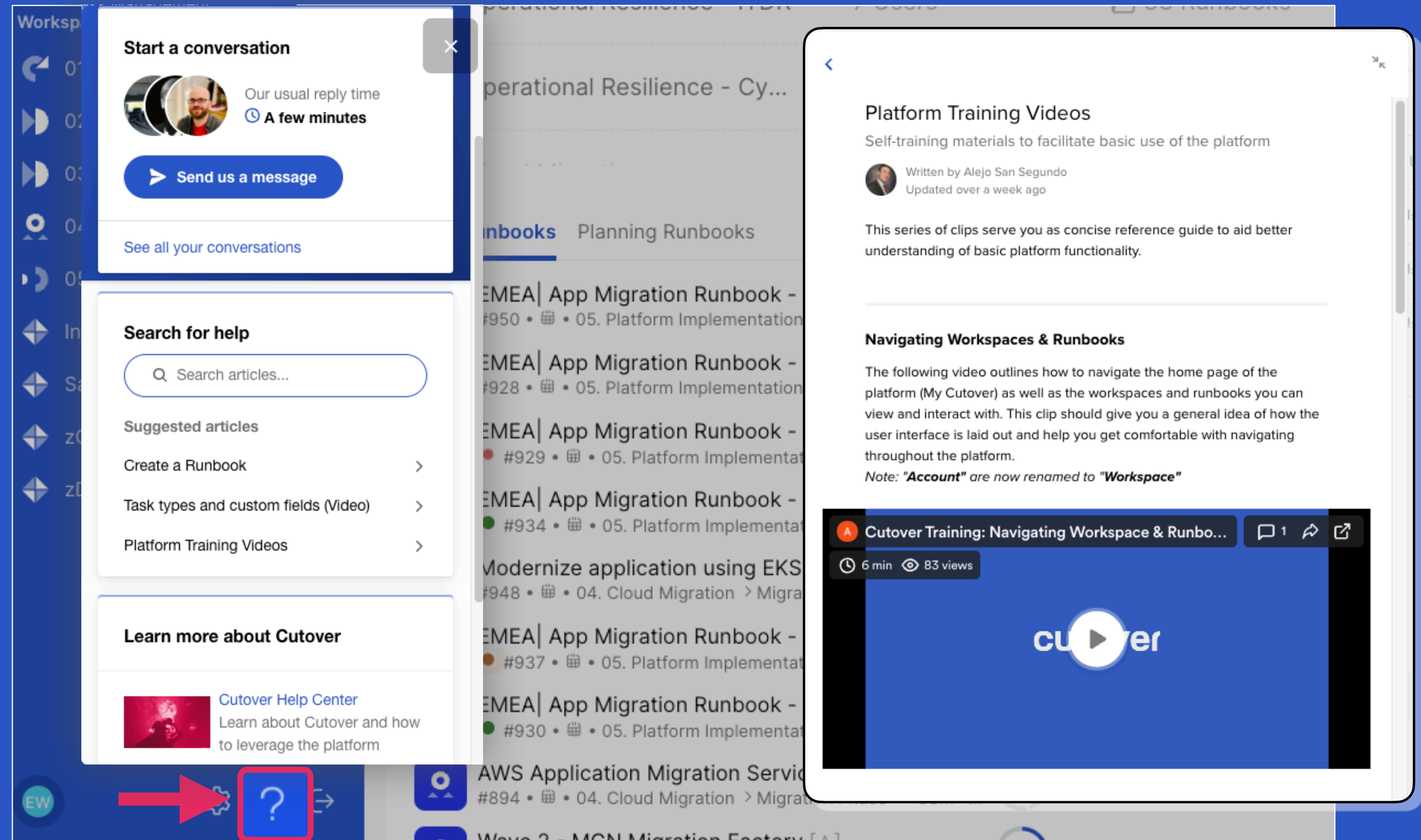


# Available resources

For more detailed information on the Cutover platform, please visit the Help Centre by clicking on the question mark located on the bottom left hand side of your screen, at any time.

Within our “Help” section, you will find:

- ◆ Help Centre articles
- ◆ Training videos
- ◆ In-App chat support
- ◆ Reference guides
- ◆ Cutover use cases



If you cannot access the Chat Support, please contact [support@cutover.com](mailto:support@cutover.com) for further assistance and any technical queries.





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