cutover

Quick Start Guide

Welcome to Cutover

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.

Table of content

Accessing Cutover

Authentication methods

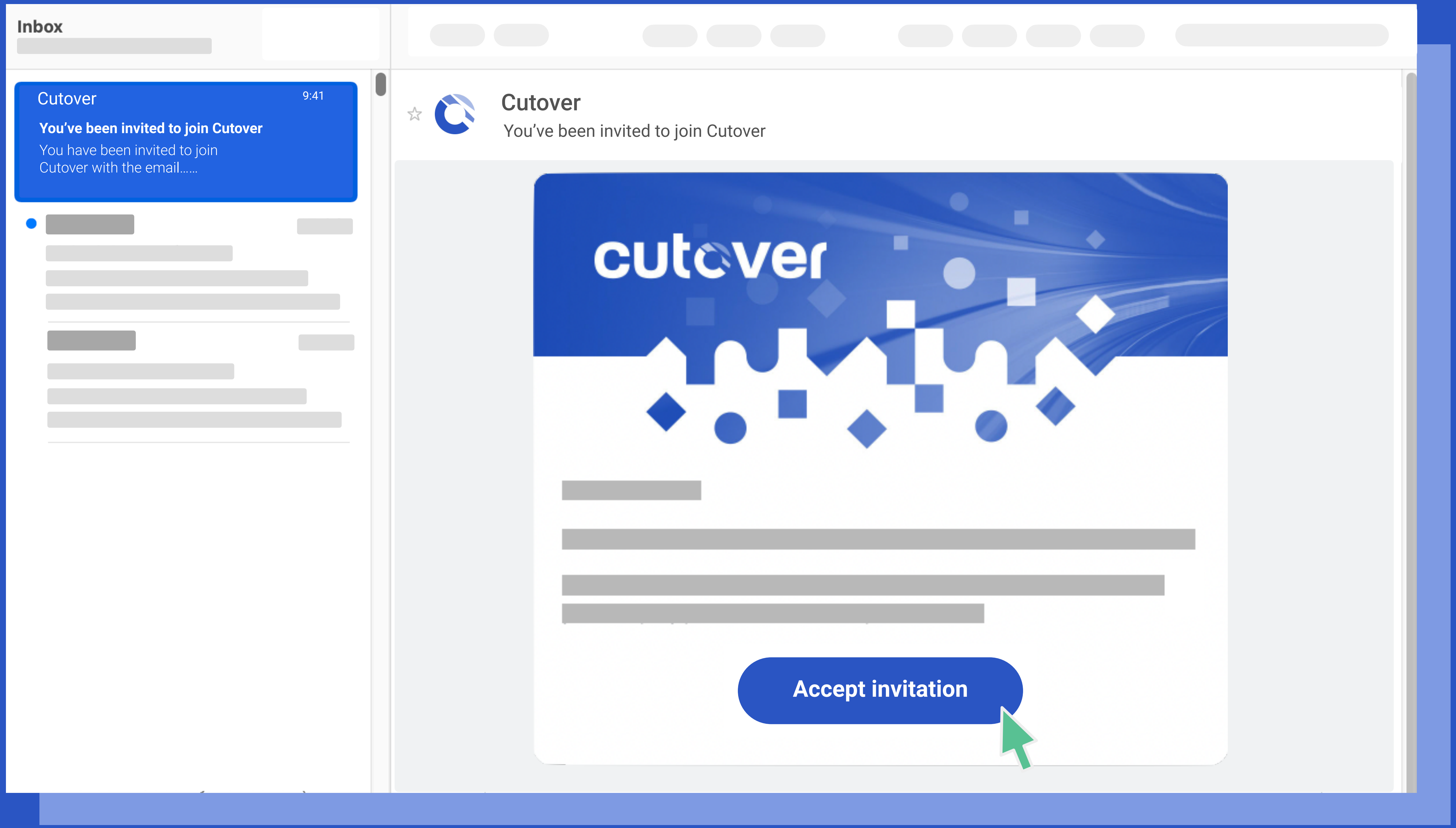
Email and password

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)

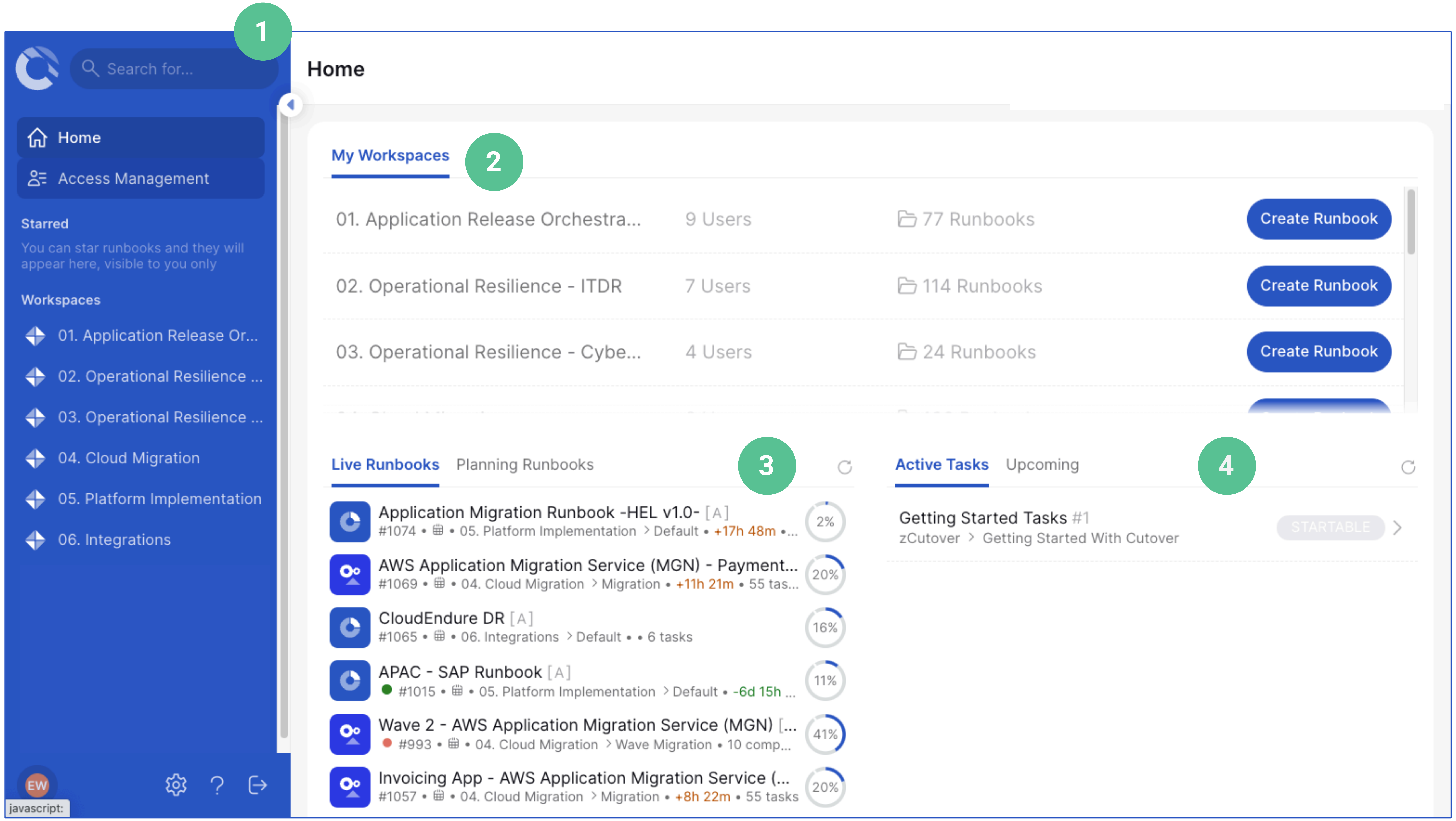
Once registered, clicking the login button will take you through to your internal SSO provider for verification.

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



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

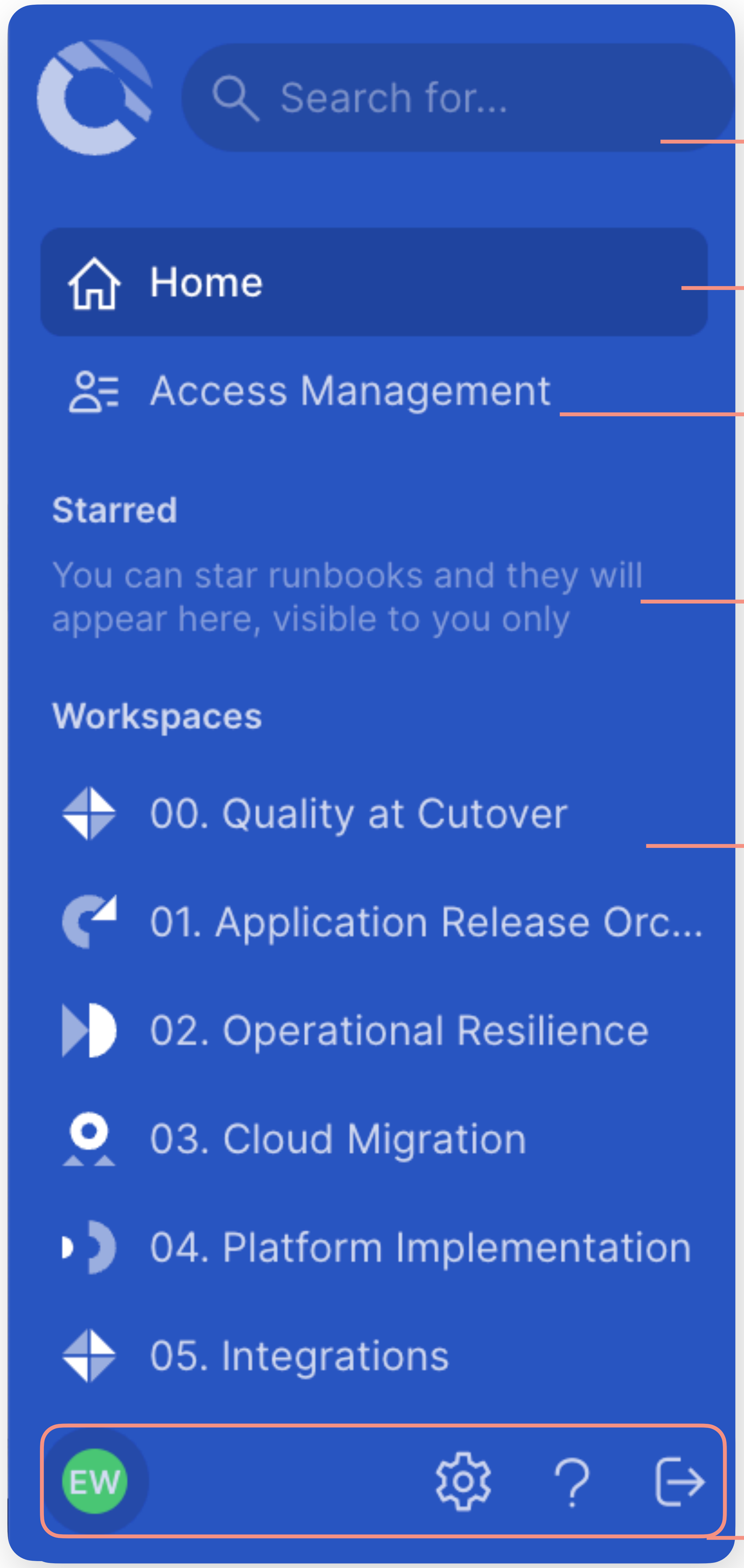
2 **Workspaces** you are a member of and where you will find all the runbooks you have access to.

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

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

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

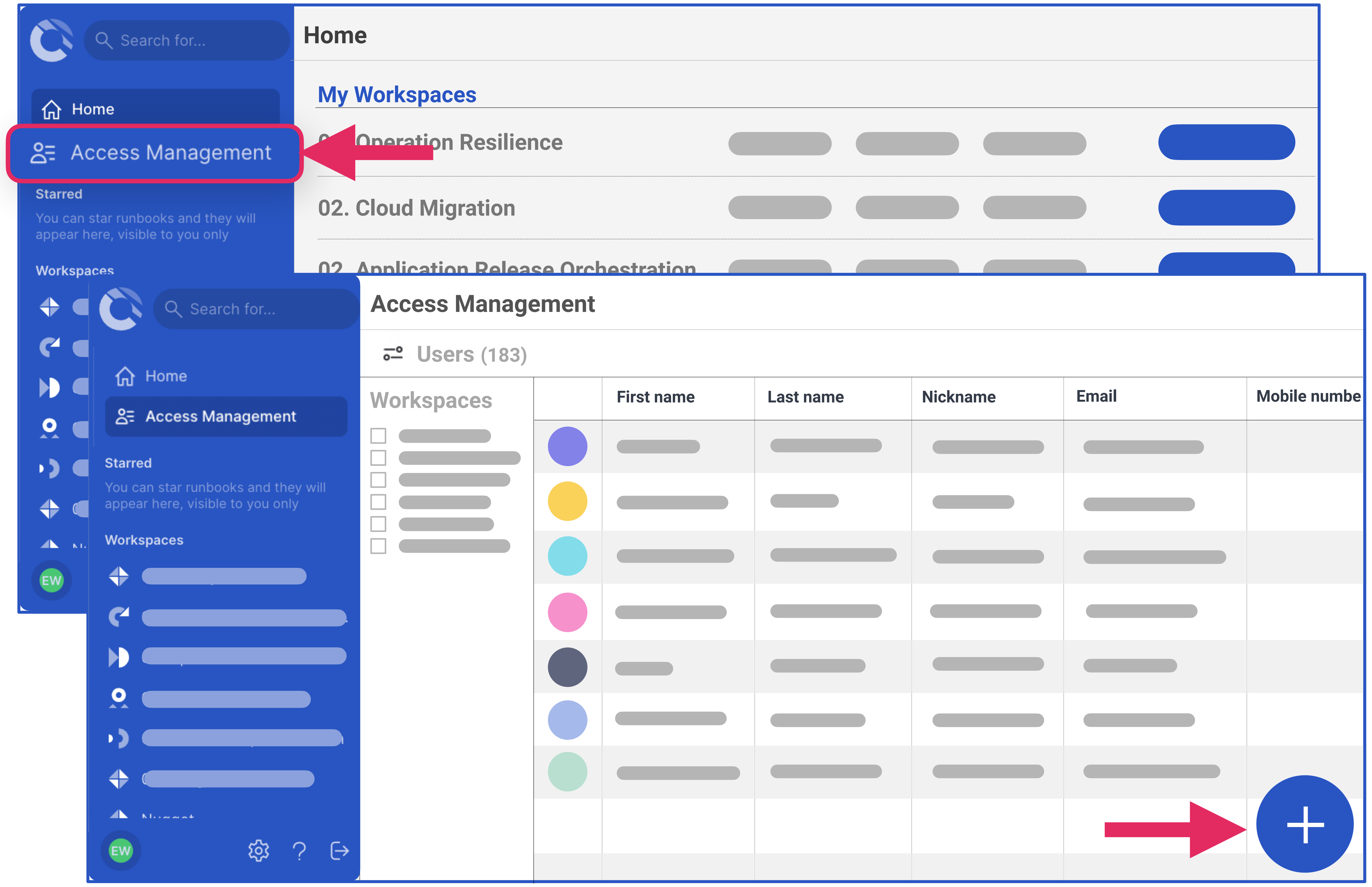
The Help icon gives you access to In-App chat support and Help Centre articles, including training and enablement videos and guides.

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)

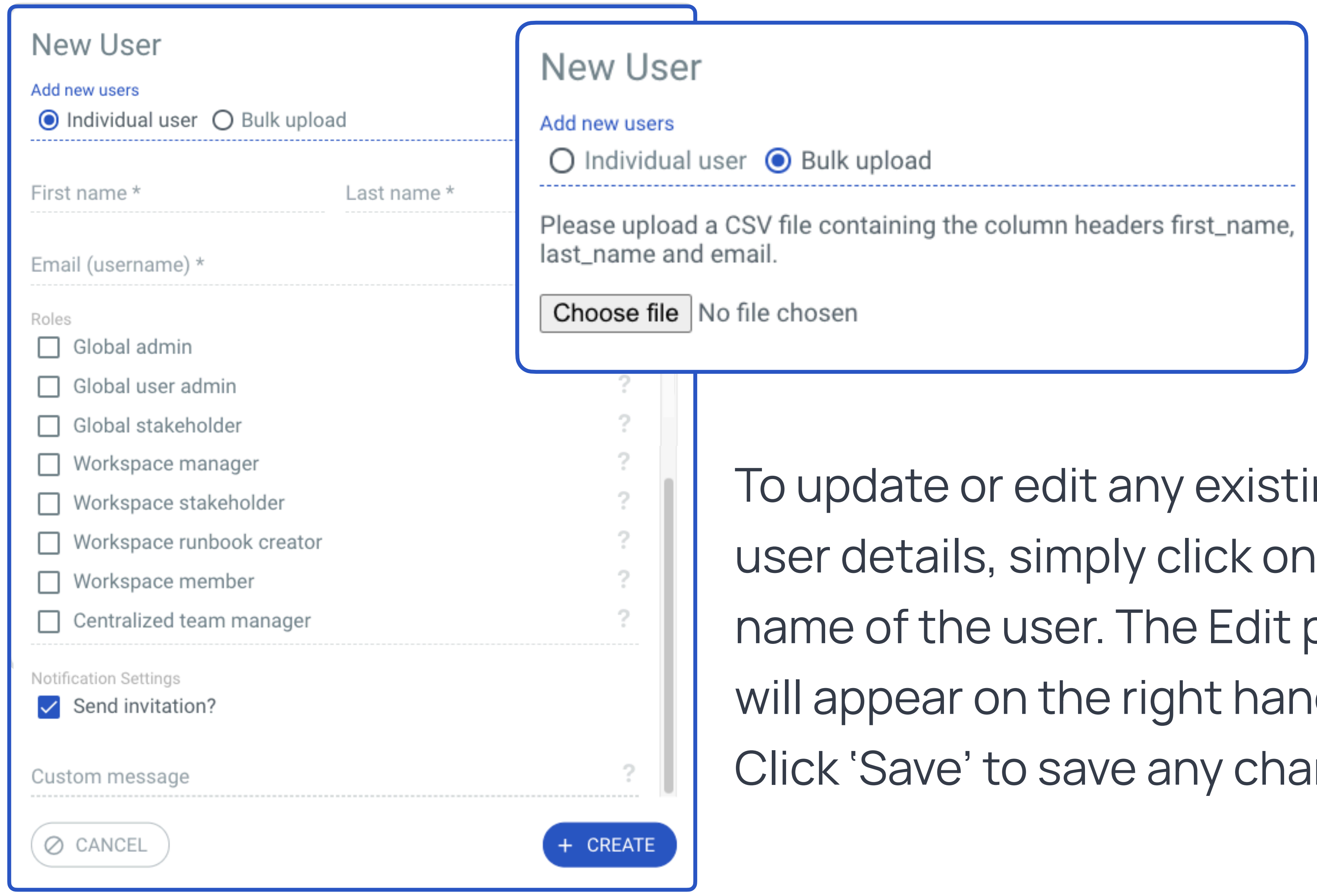
01 To invite new users, select the **Access management** button on the left hand side, then click on the + button on the bottom right.



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

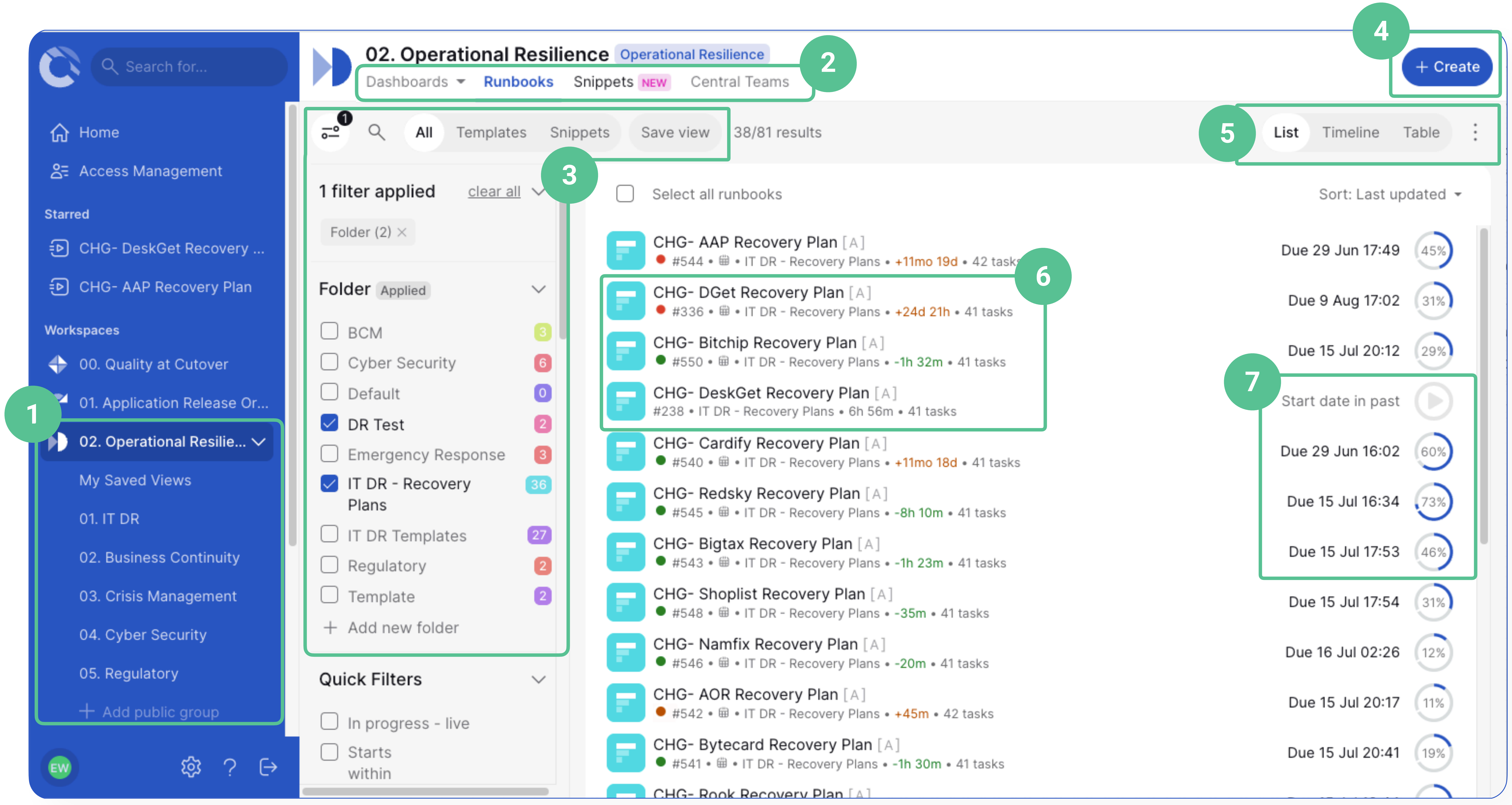
- individual users to manually add a name and email
- bulk upload via CSV.

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.



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

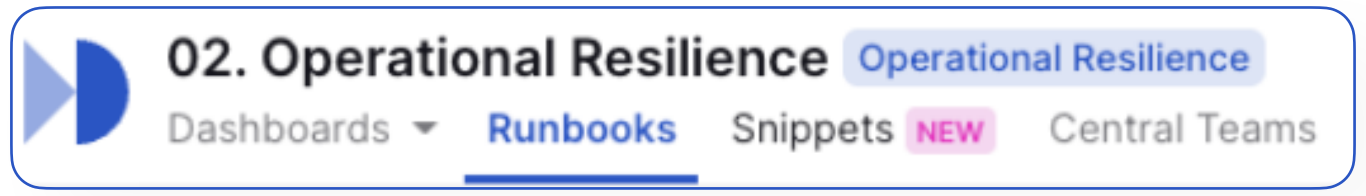
Workspace Overview



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

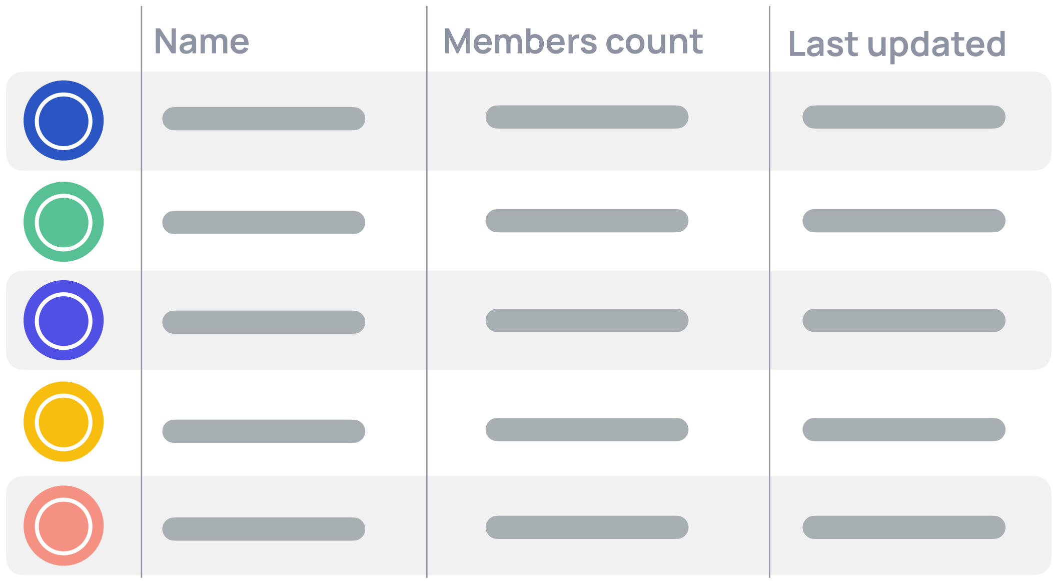
Runbooks will display a list of runbooks and templates you have access to. This is the default view when you first land in the workspace. You can change the way you view the list of runbooks using the “runbook views” section.

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



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)

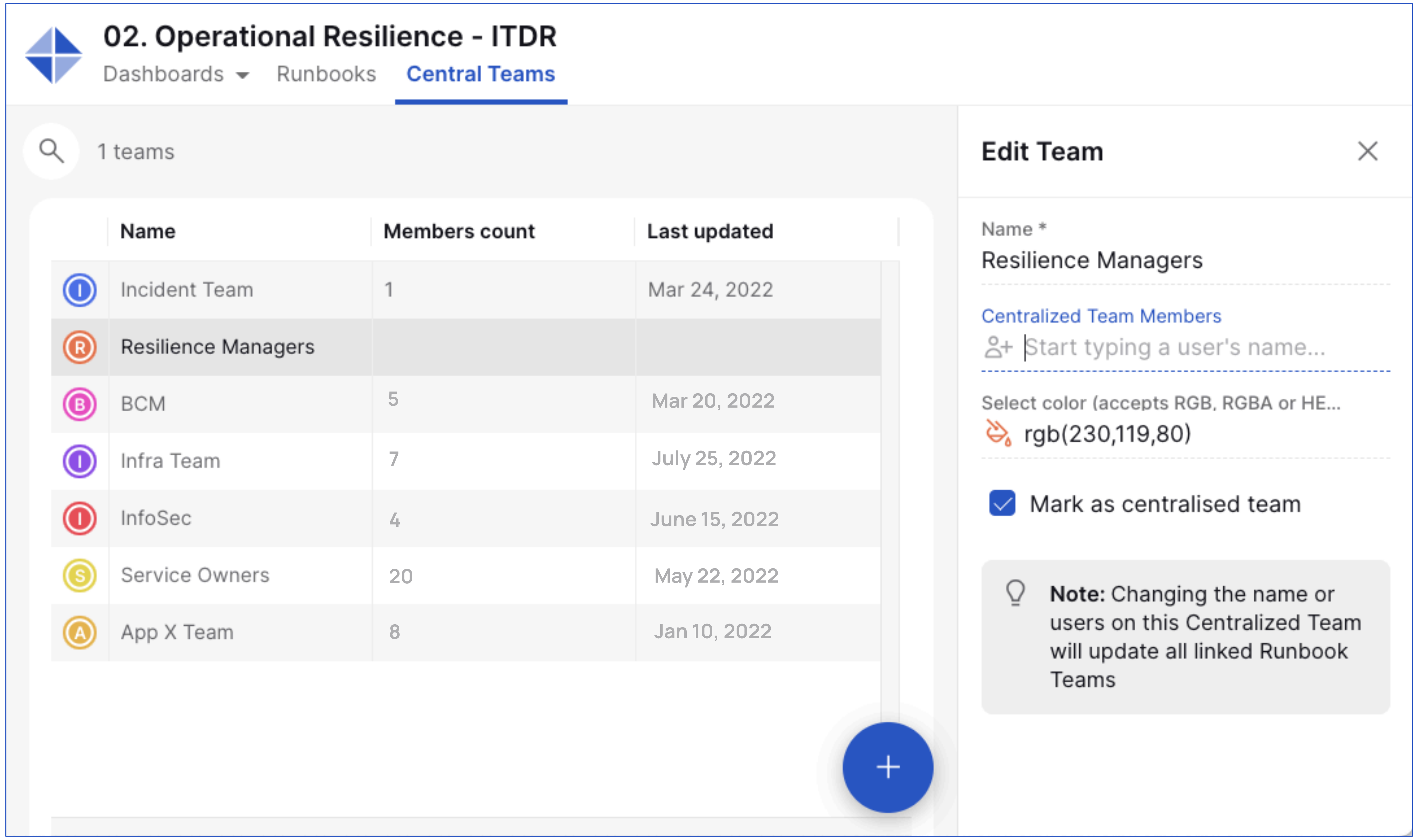
Centralised teams are managed and created at a Workspace level by users with **Workspace manager** and **Centralized team manager** permissions.

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.



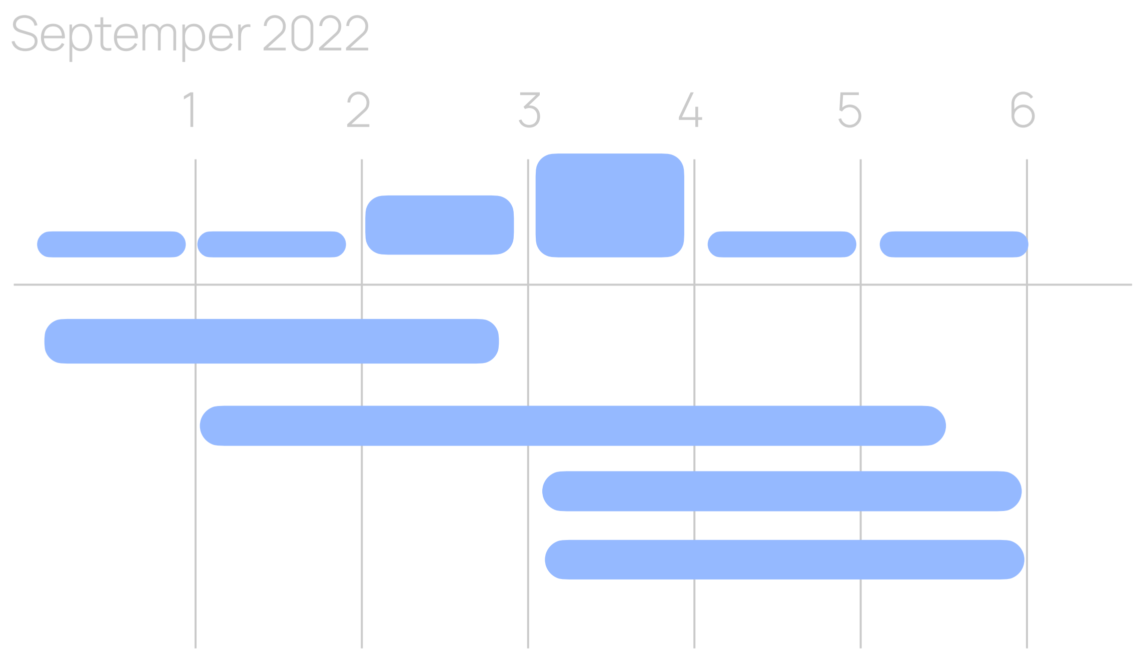
Workspace Views

List Timeline Table

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.

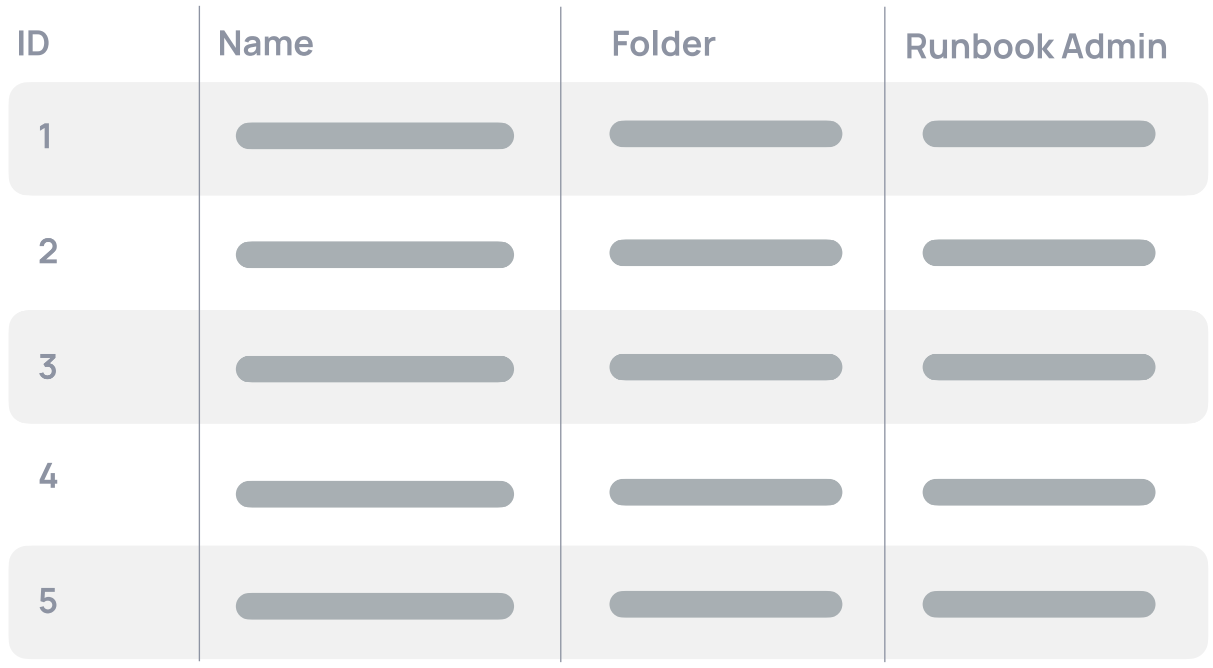
Timeline



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



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.

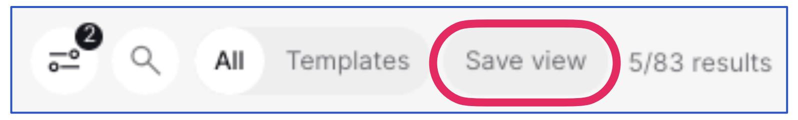
Folders and Filters

Filters

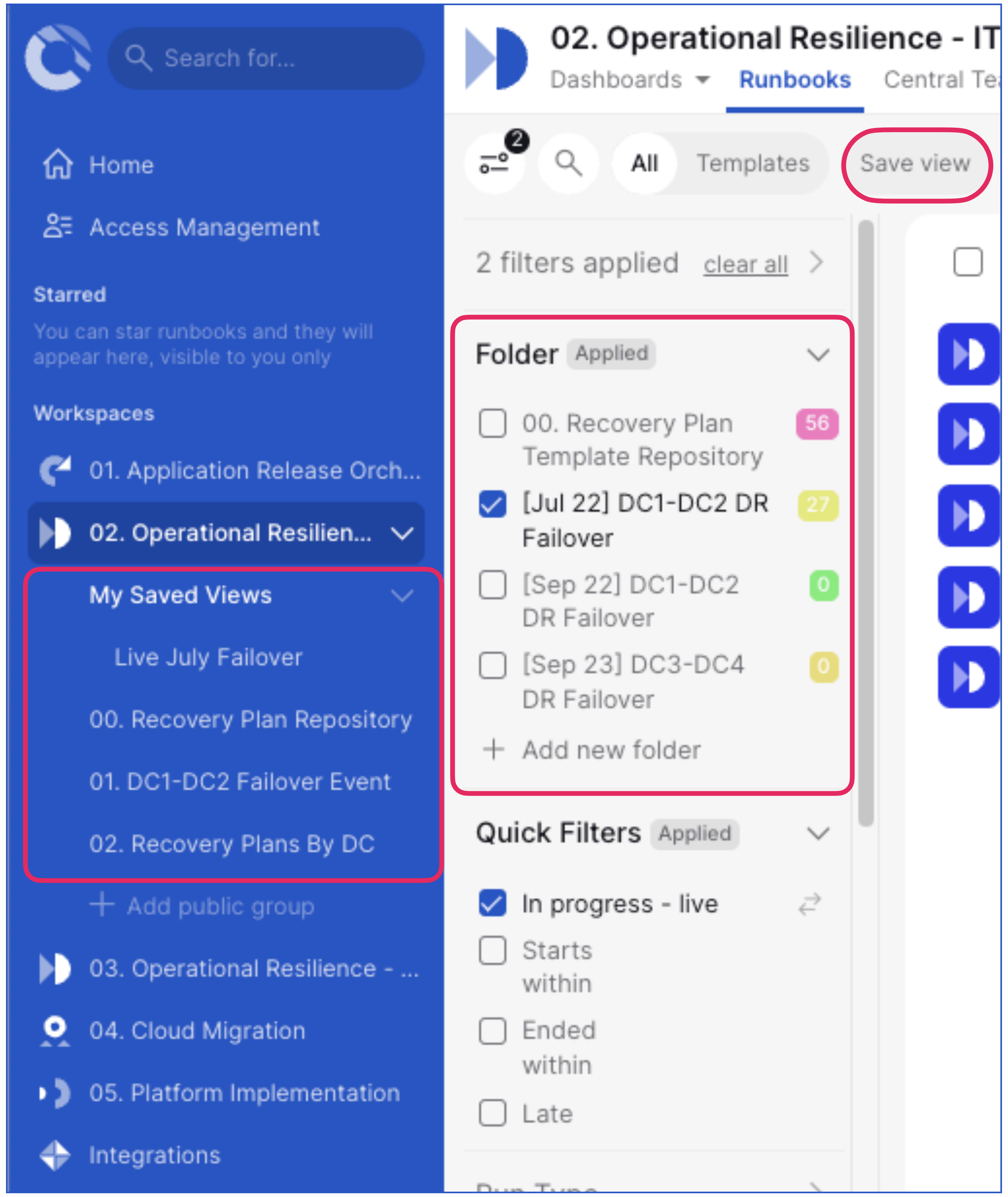
Locate a specific runbook or runbooks using filters. In your workspace view, click the filter icon. Filter results by folder, run type, runbook type, and more.

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.

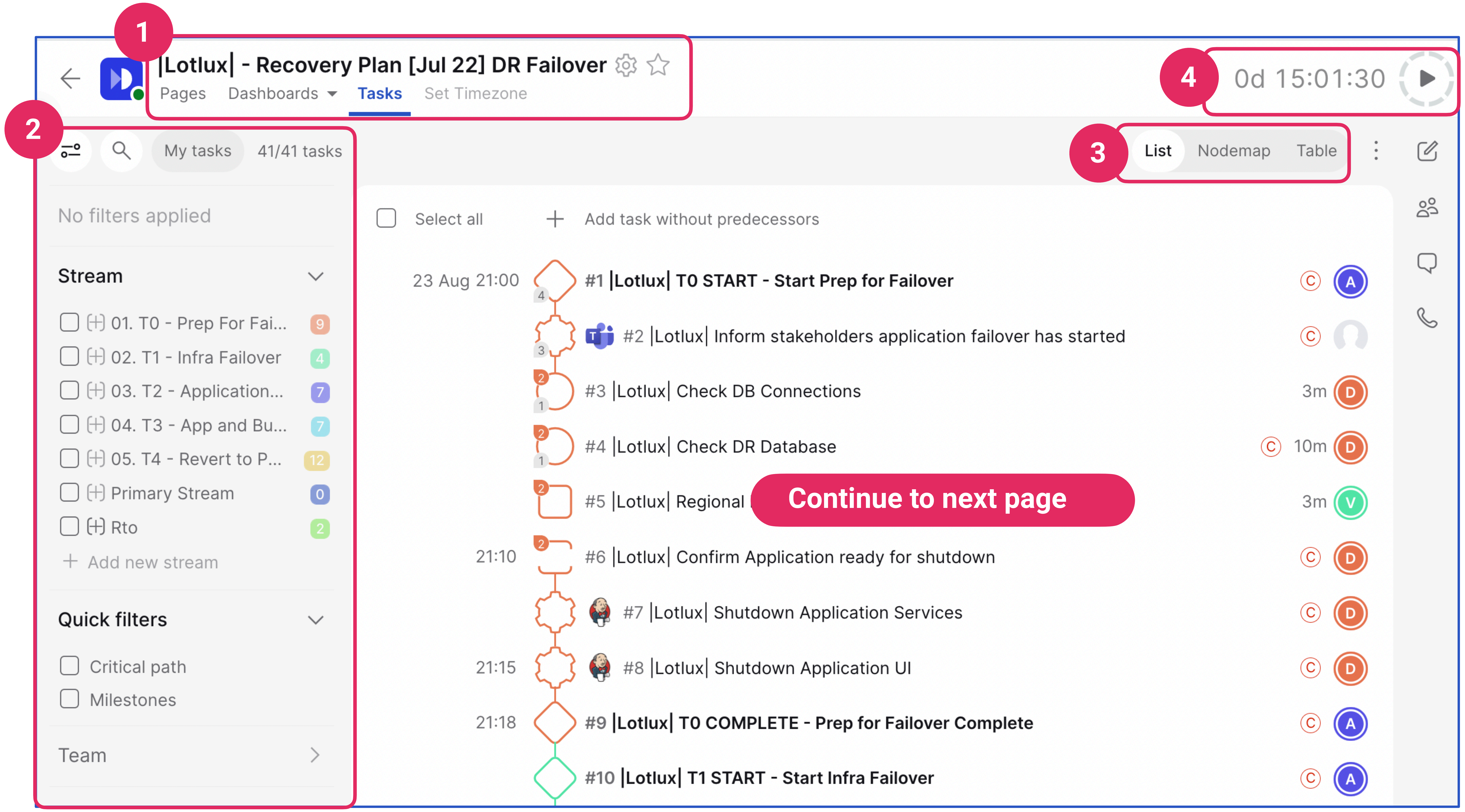
You will find the Folder section in the workspace filter panel.

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

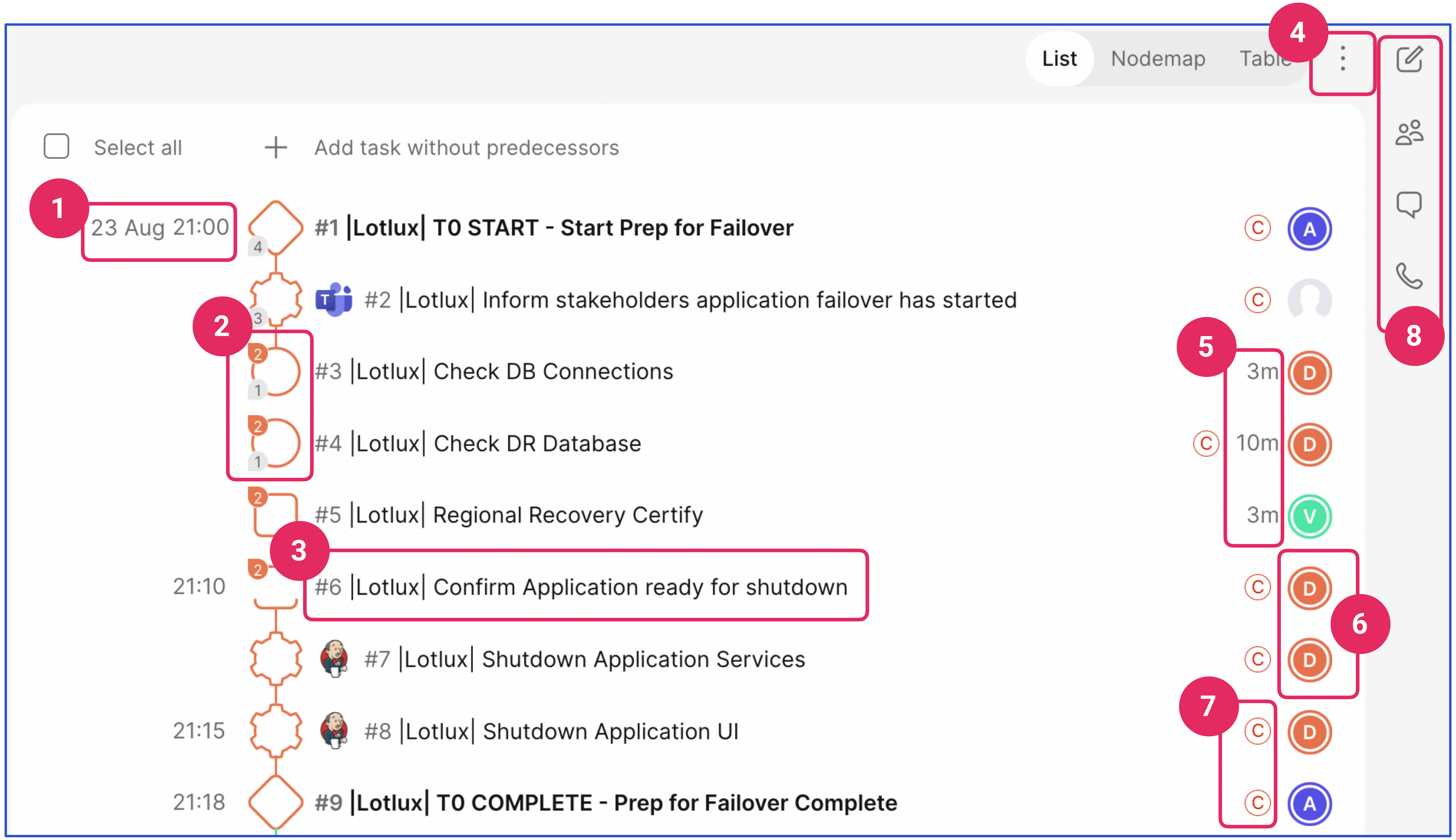


1. **Runbook name and details:**
   - **Runbook settings (runbook and task import, audit log…etc)**
   - **Star runbook,** starred runbook will appear on the navigation bar on the left hand side for quick access.
2. **Stream and runbook filters**
3. **Task views**
4. **Runbook duration & Start Runbook**
   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*

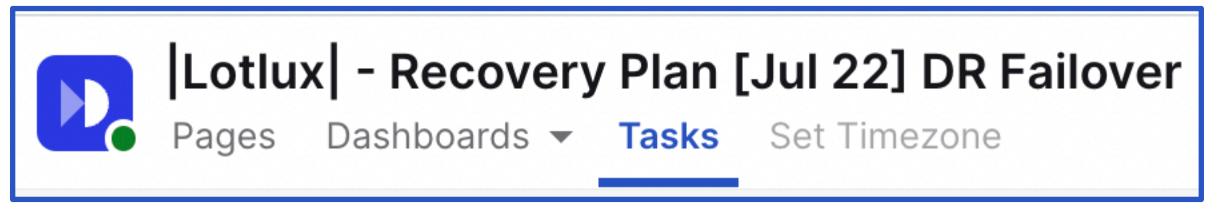
Runbook Overview



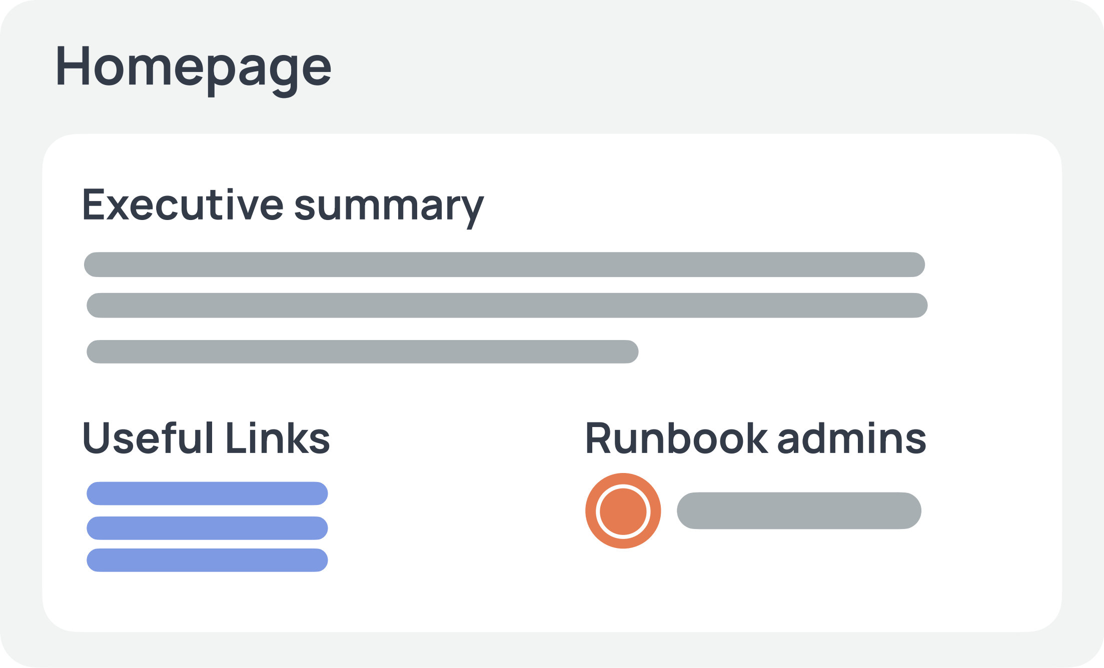
1. **Task start date and time**
2. **Task icon:**
   Icon shape = Task type
   Icon colour = Assigned streams
3. **Task ID and name** (click on task name to view tasks details)
4. **More options** (task export, highlight mode)
5. **Task duration**
6. **Assigned teams and users for task**
7. **Critical 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

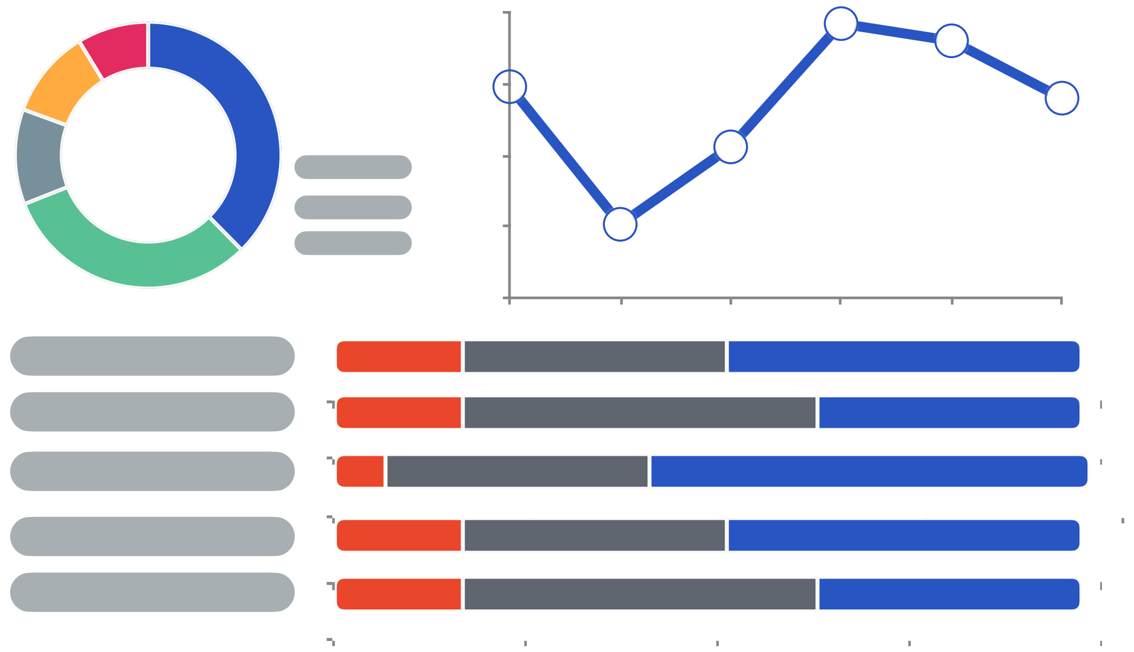


Pages



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.

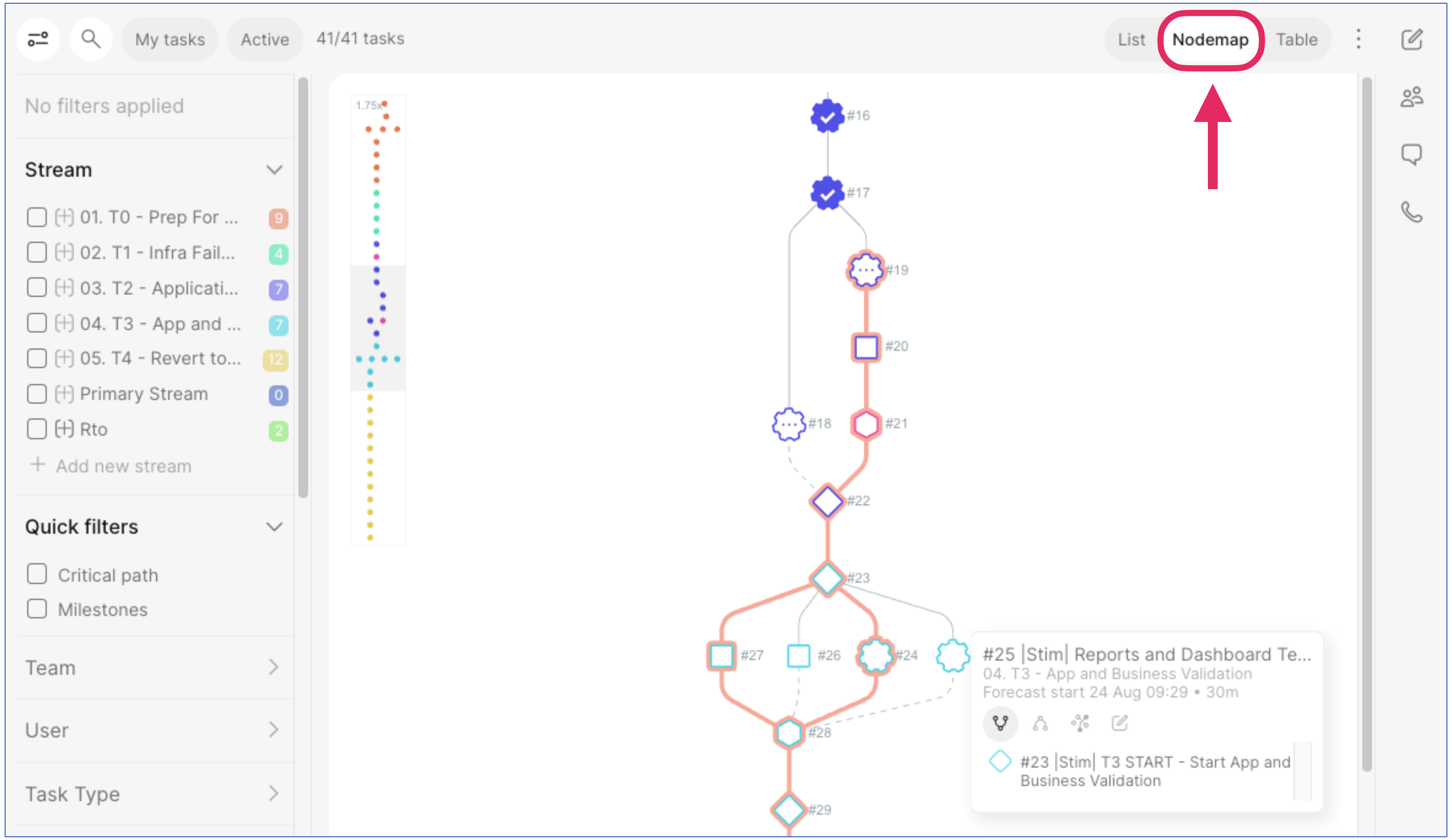
Nodemap

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.

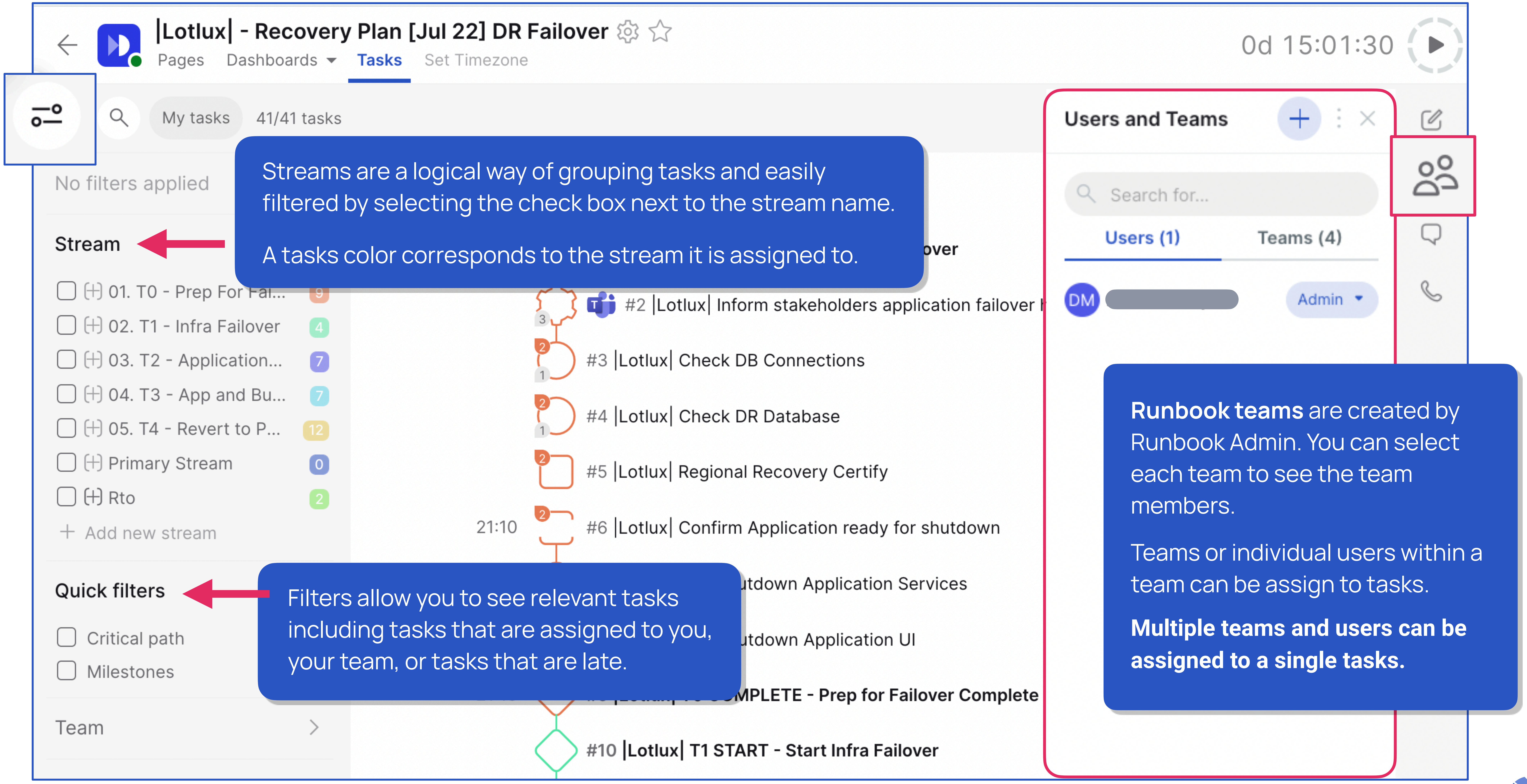
This is an interactive nodemap enabling you to click on the individual nodes to bring up the task details. If you are an admin, you can edit the tasks in this view.

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*

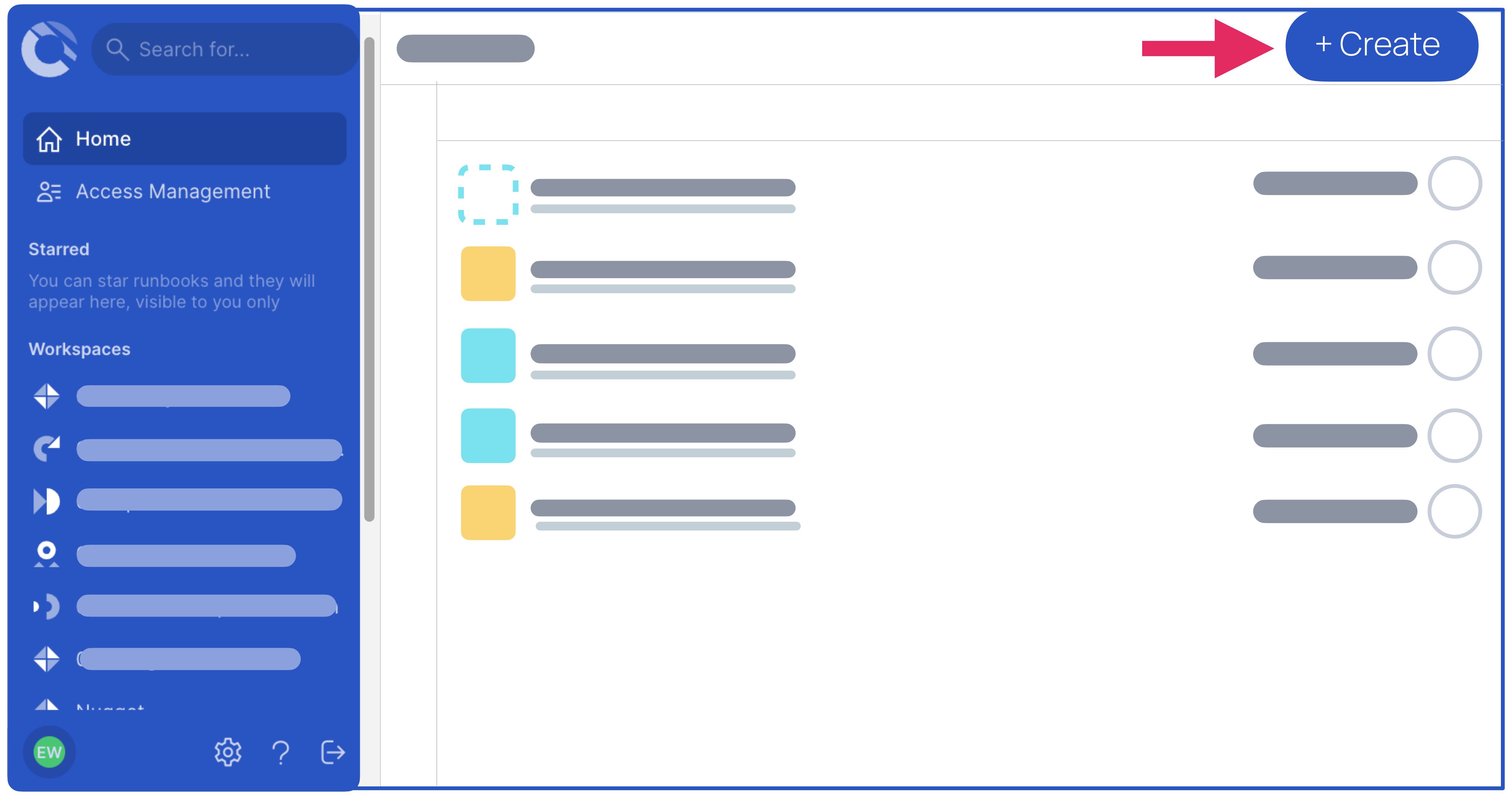
Streams, filters and Runbook teams



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

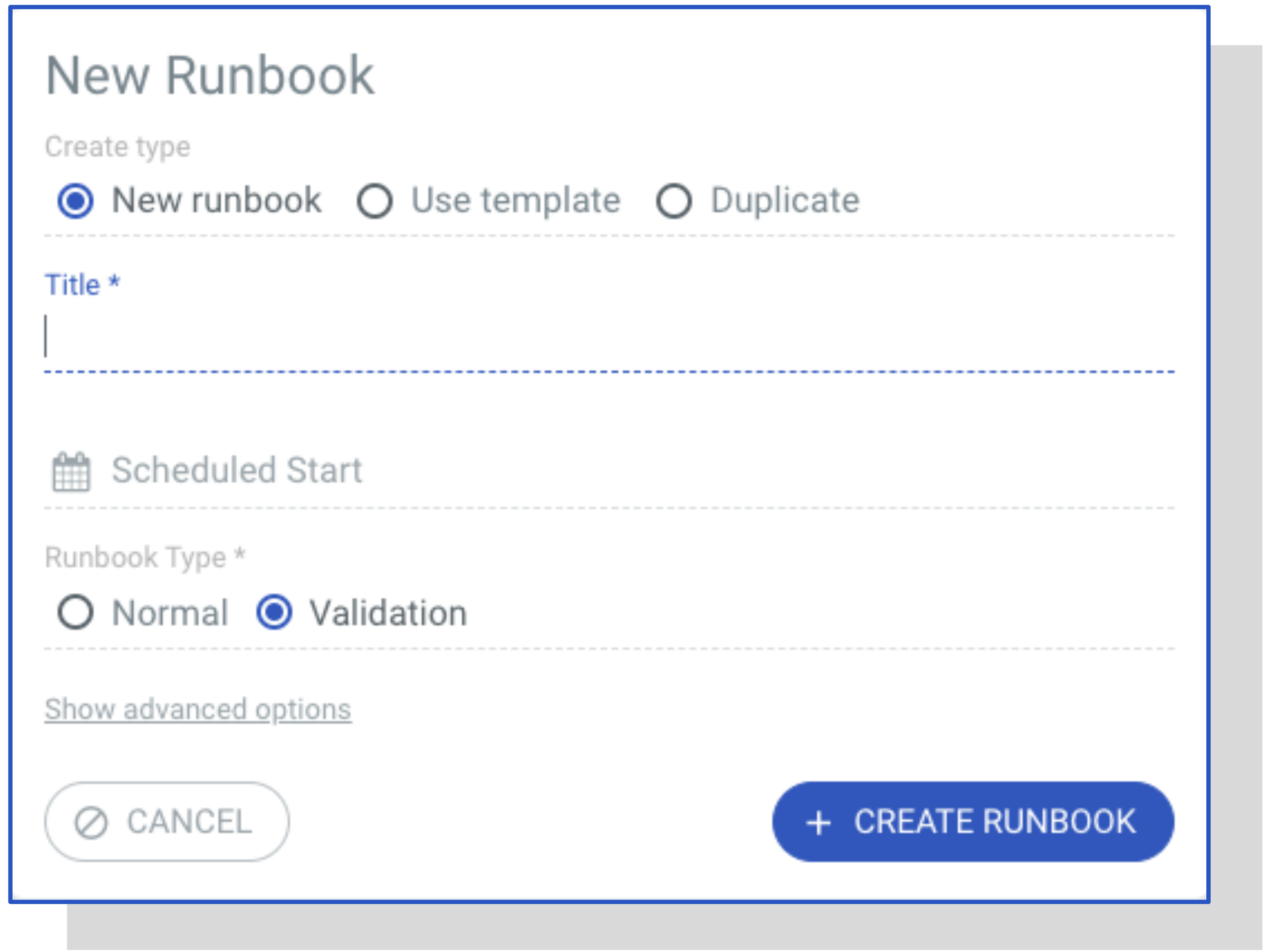
Create runbook (for Runbook Creator)

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**



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.

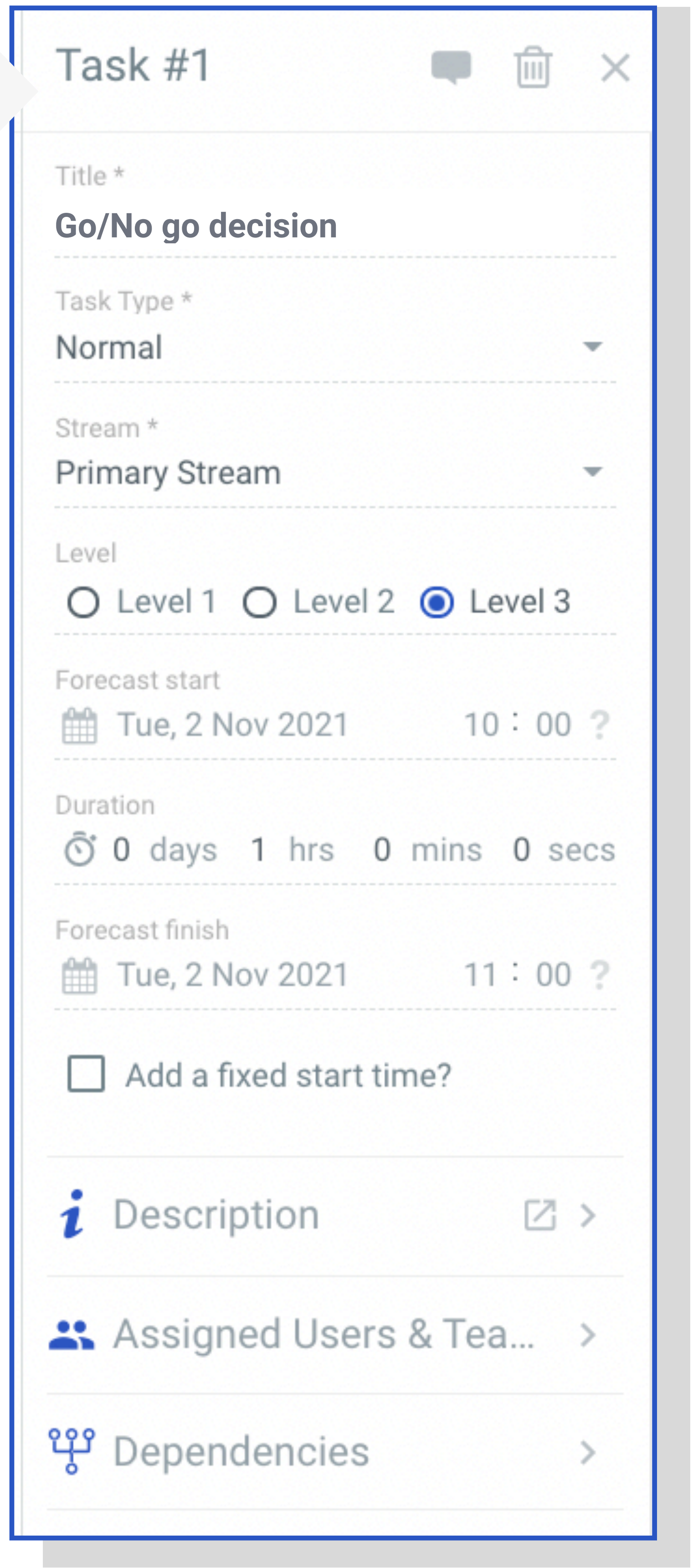
Edit a task

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.

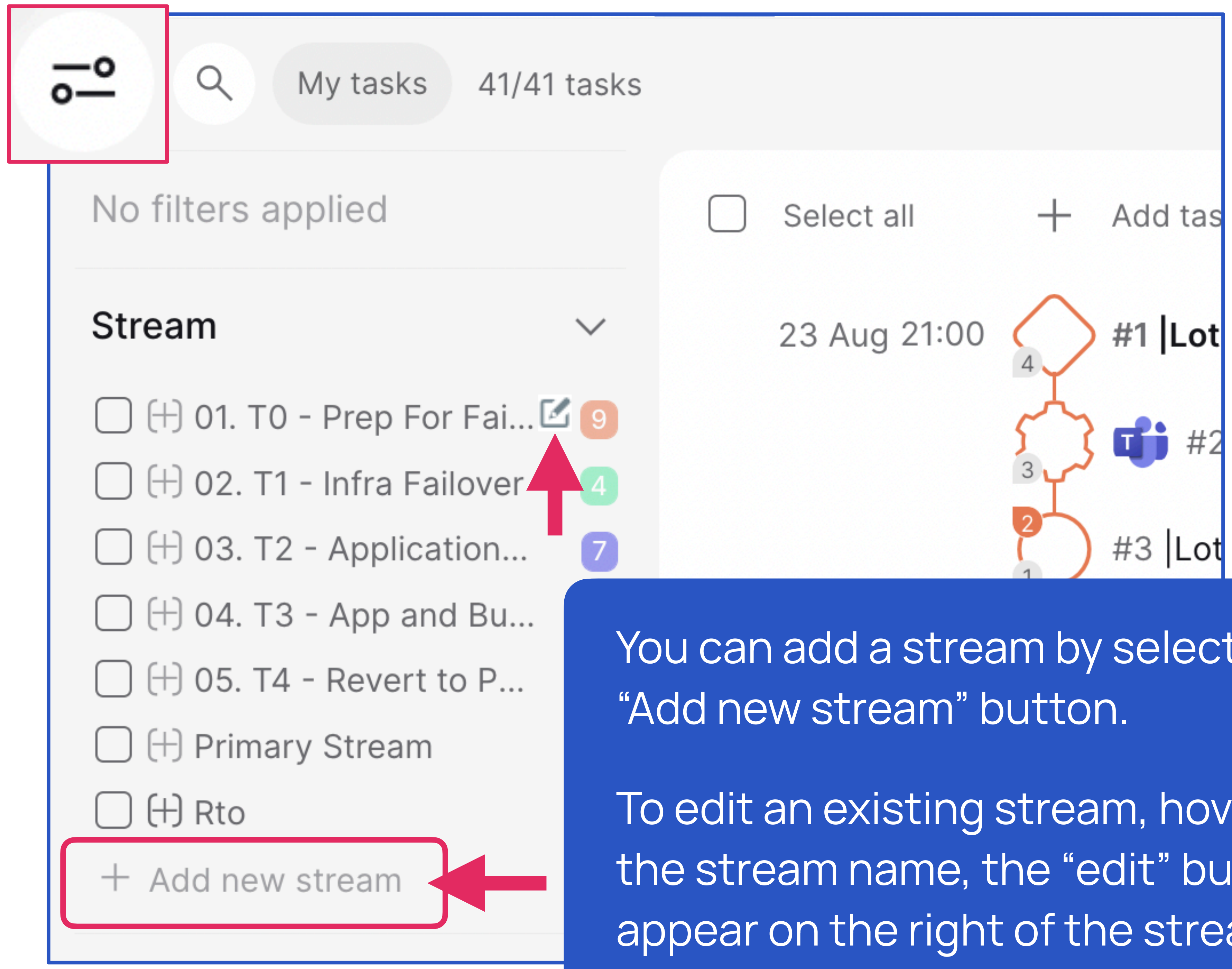
Updated details need to be saved once completed using the “Save” button, which will only appear once details have been changed.



*** 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

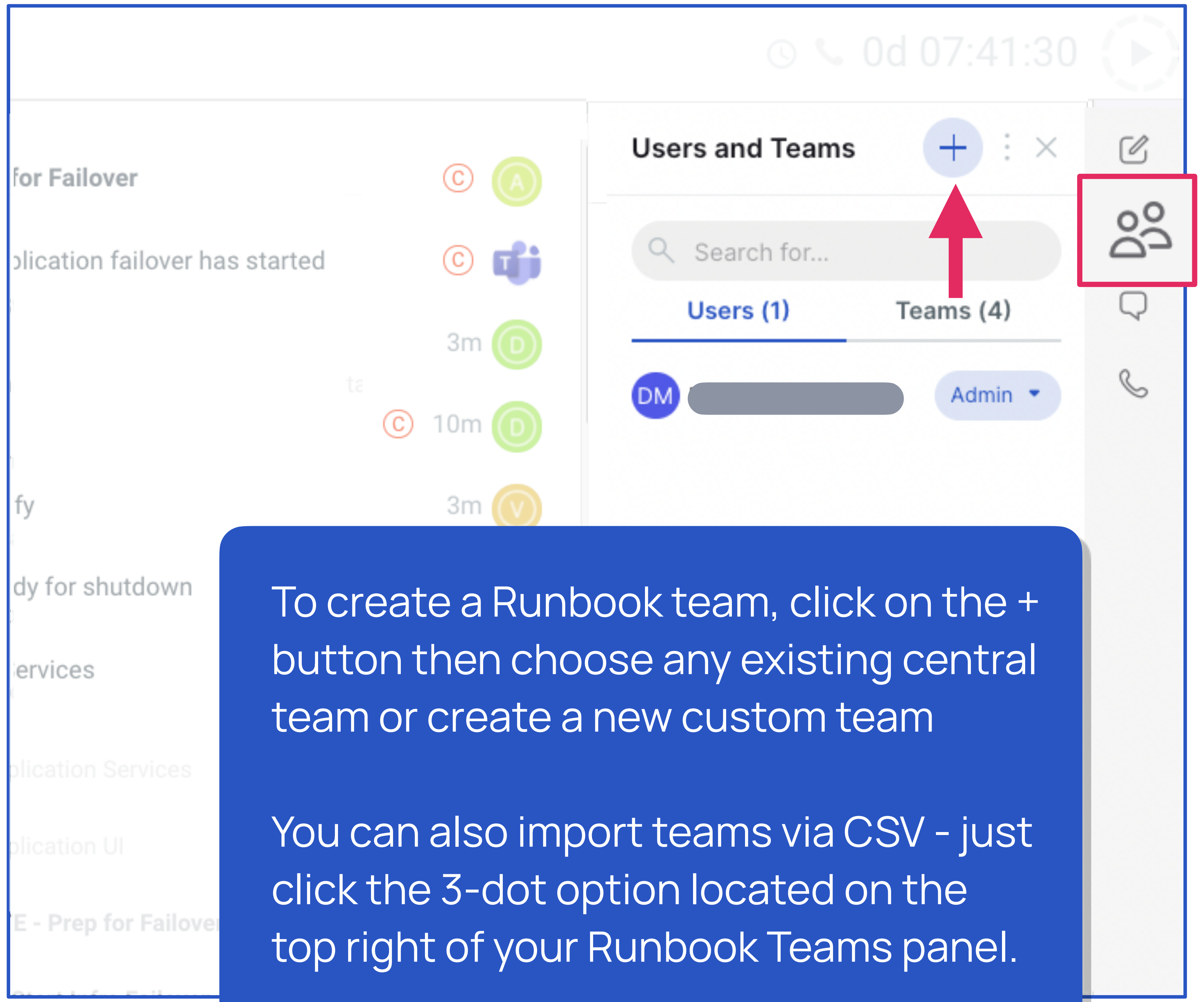


You can add a stream by selecting the "Add new stream" button.

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

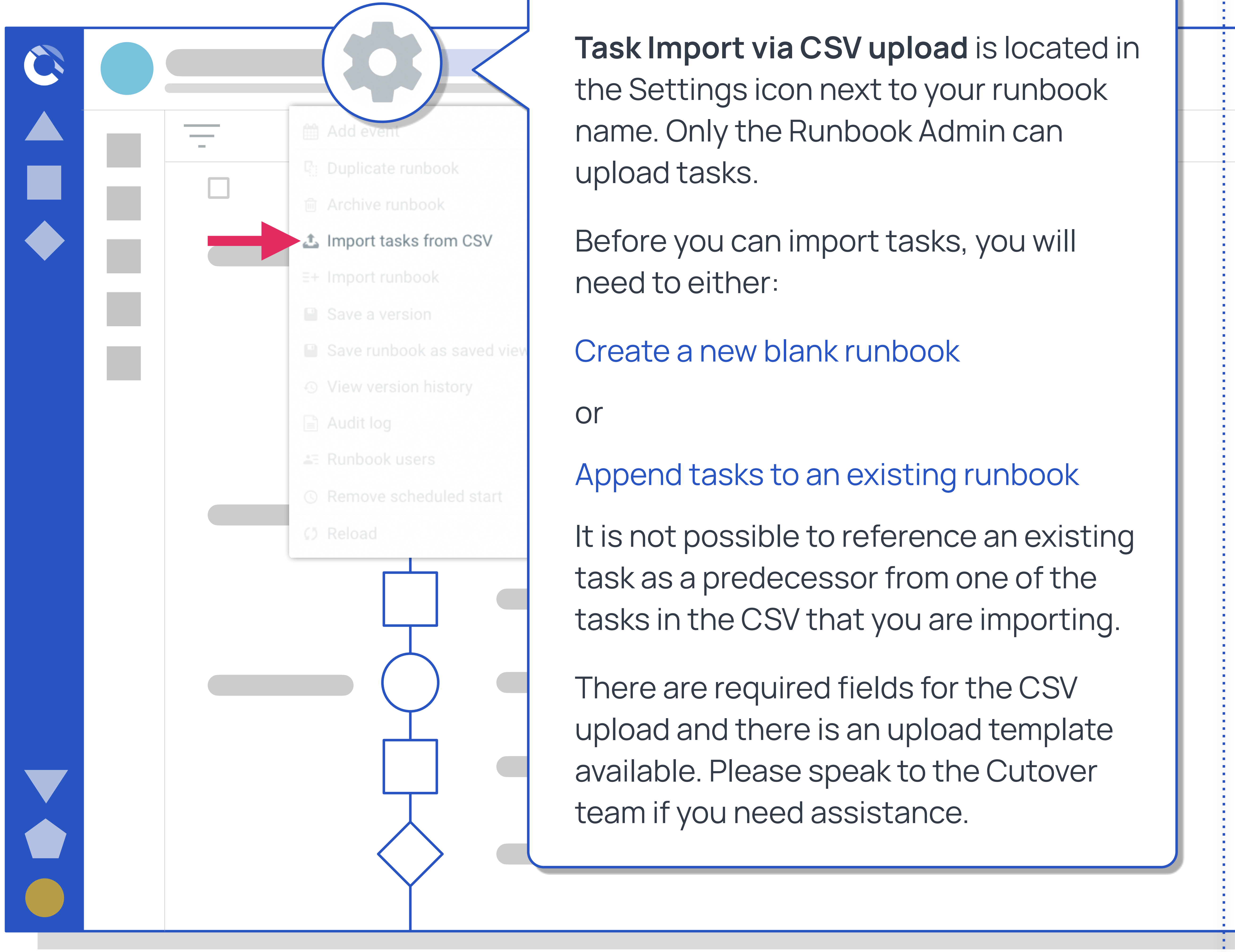


To create a Runbook team, click on the + button then choose any existing central team or create a new custom team

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:

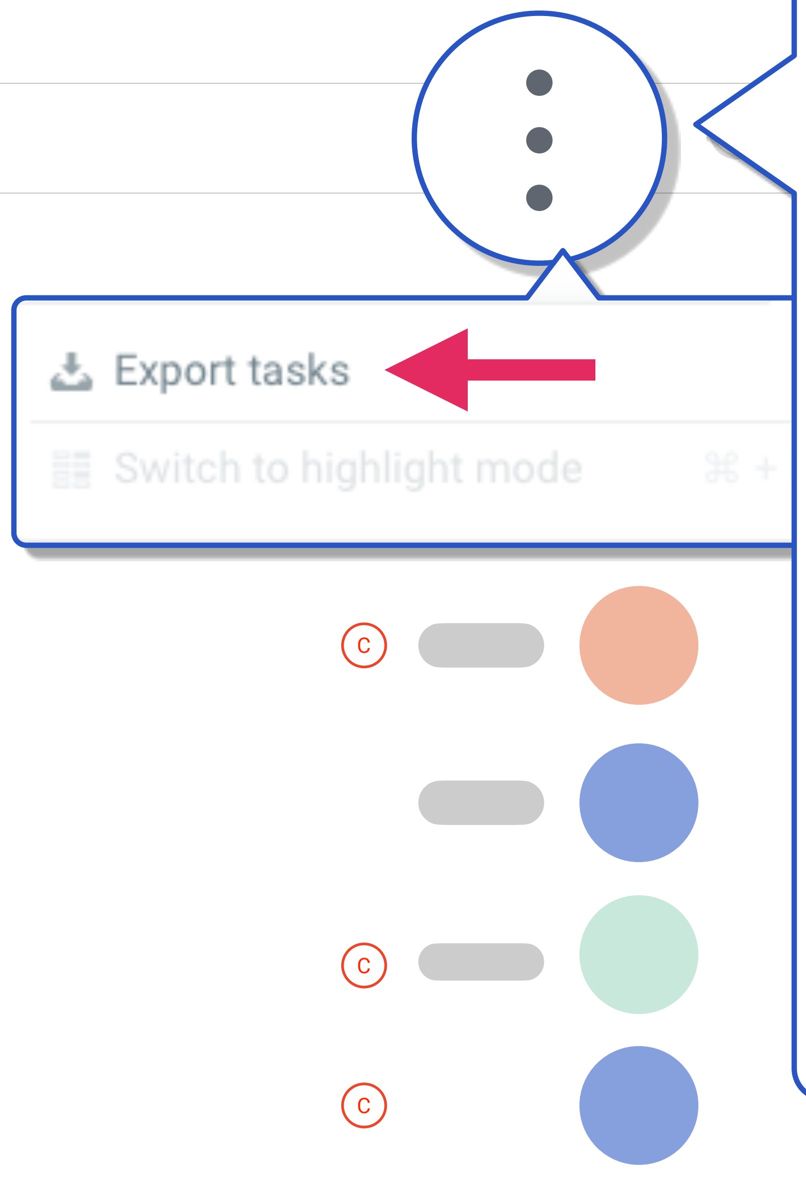
Create a new blank runbook

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.

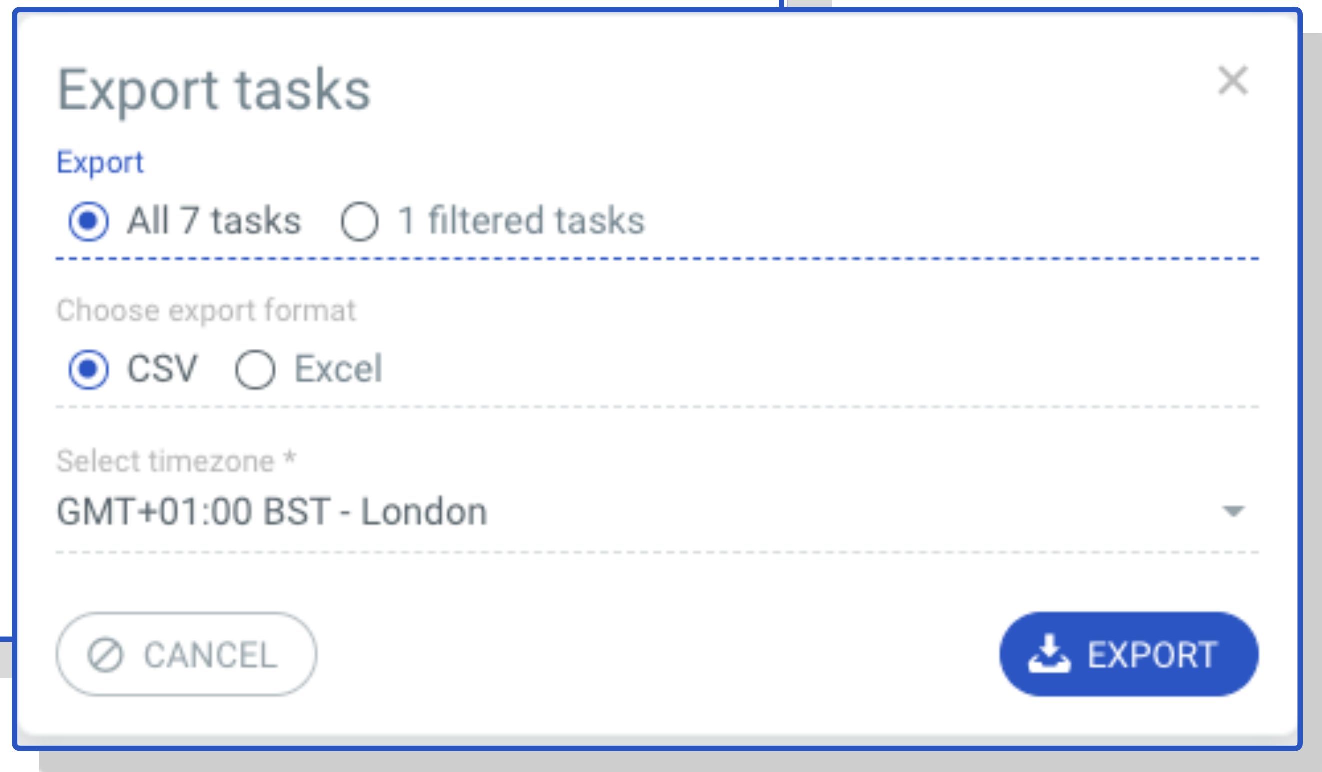
There are required fields for the CSV upload and there is an upload template available. Please speak to the Cutover team if you need assistance.



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:

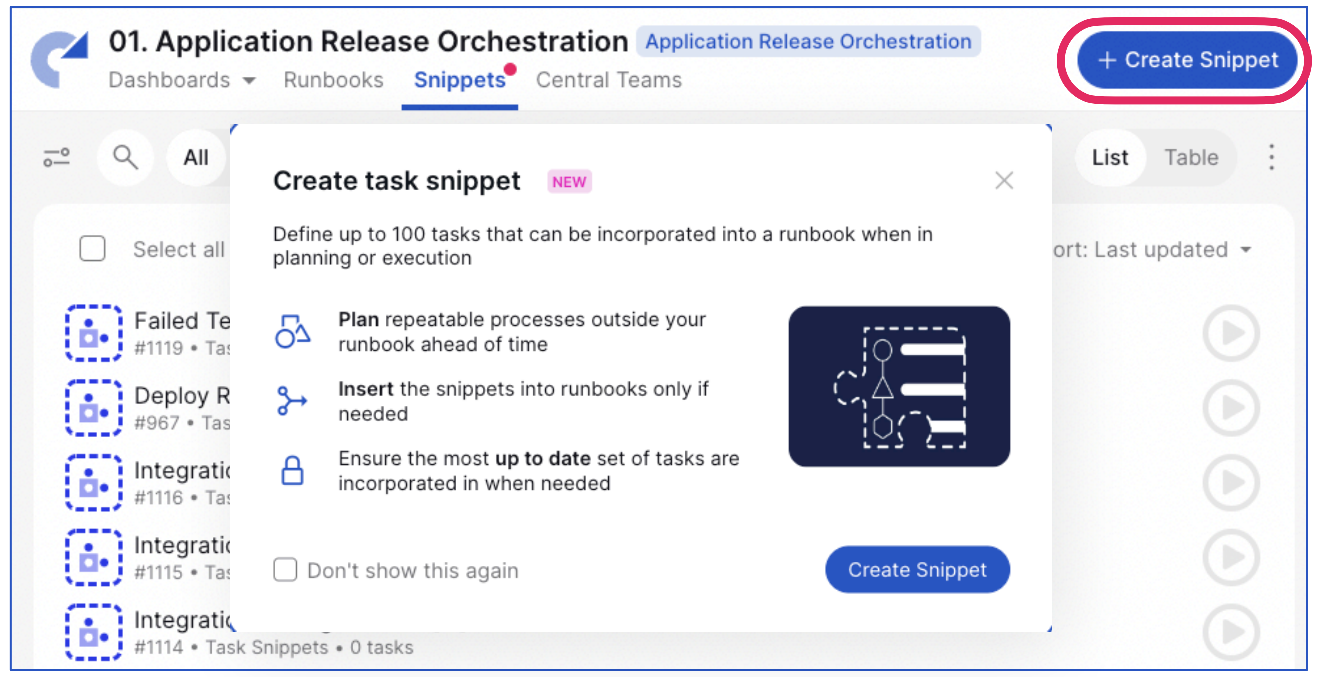
- Export all tasks or the current filtered view
- CSV or Excel file format
- Timezone



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

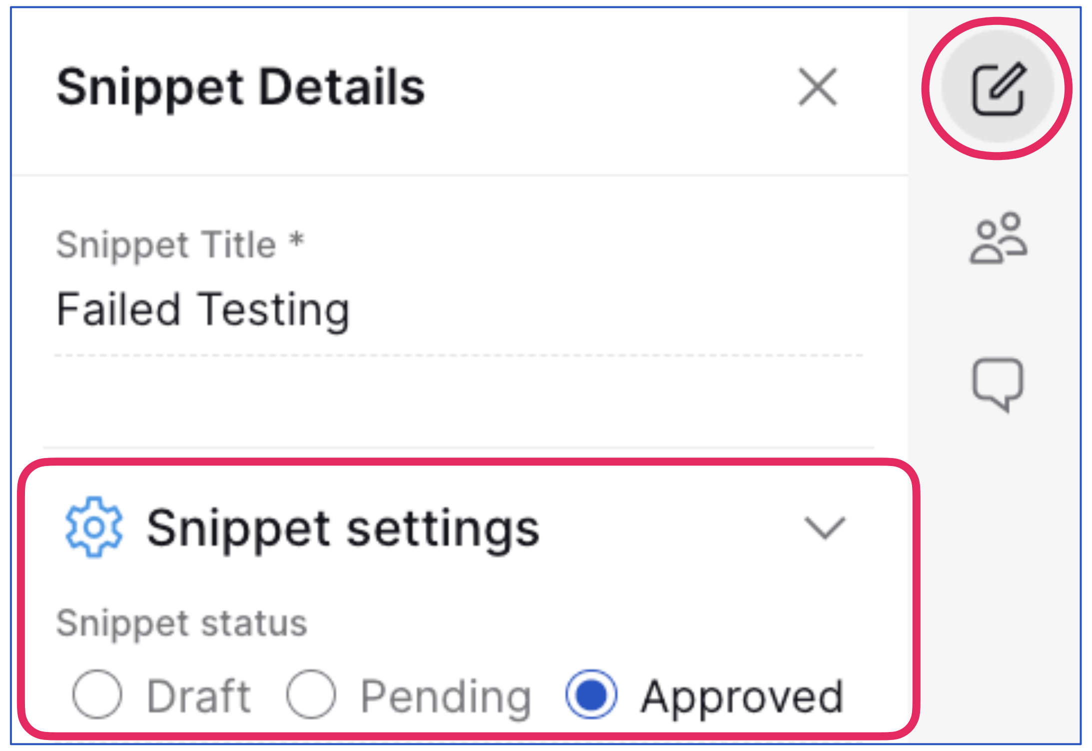


To create a snippet, click the Snippets tab in your workspace. Next, click the **+ Create Snippet** button on the upper right-hand corner of the screen.

You have the ability to add up to 100 tasks.

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

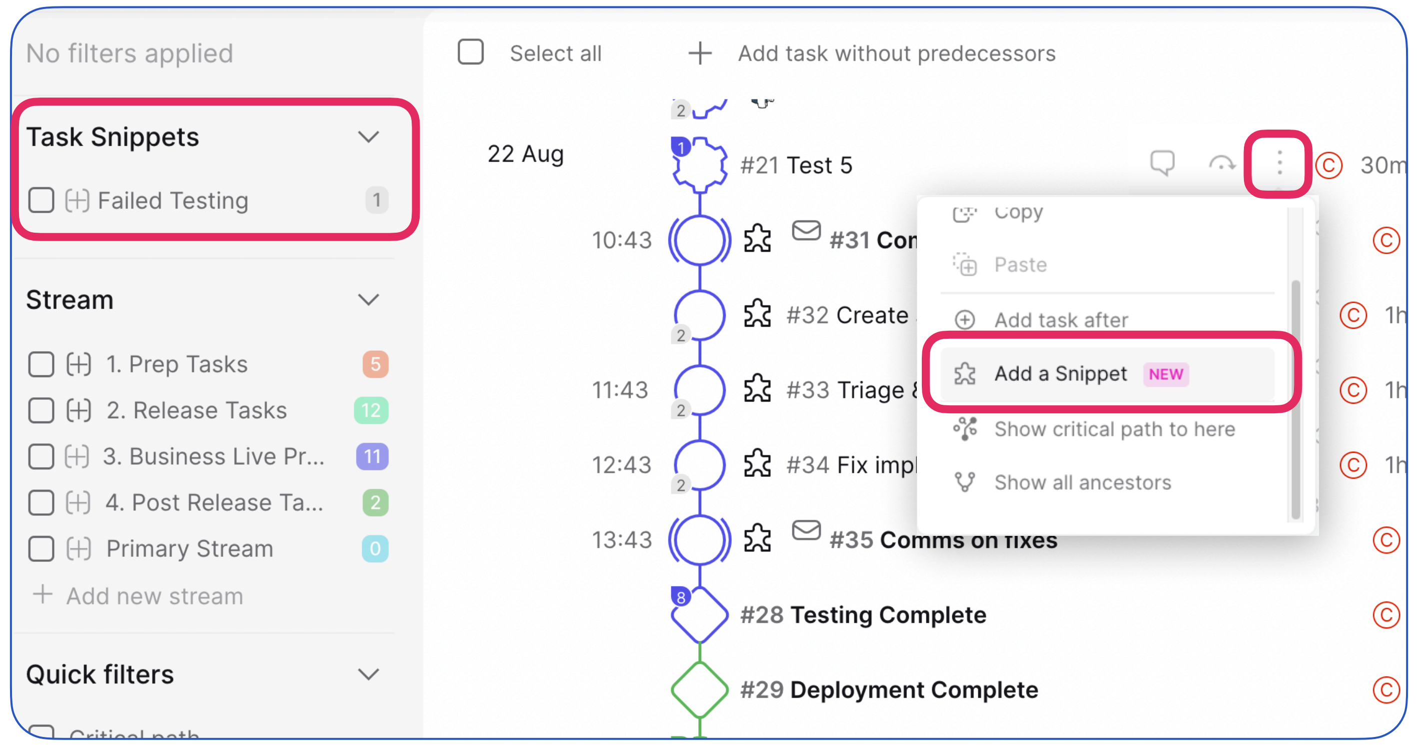
Approve Snippets



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**.

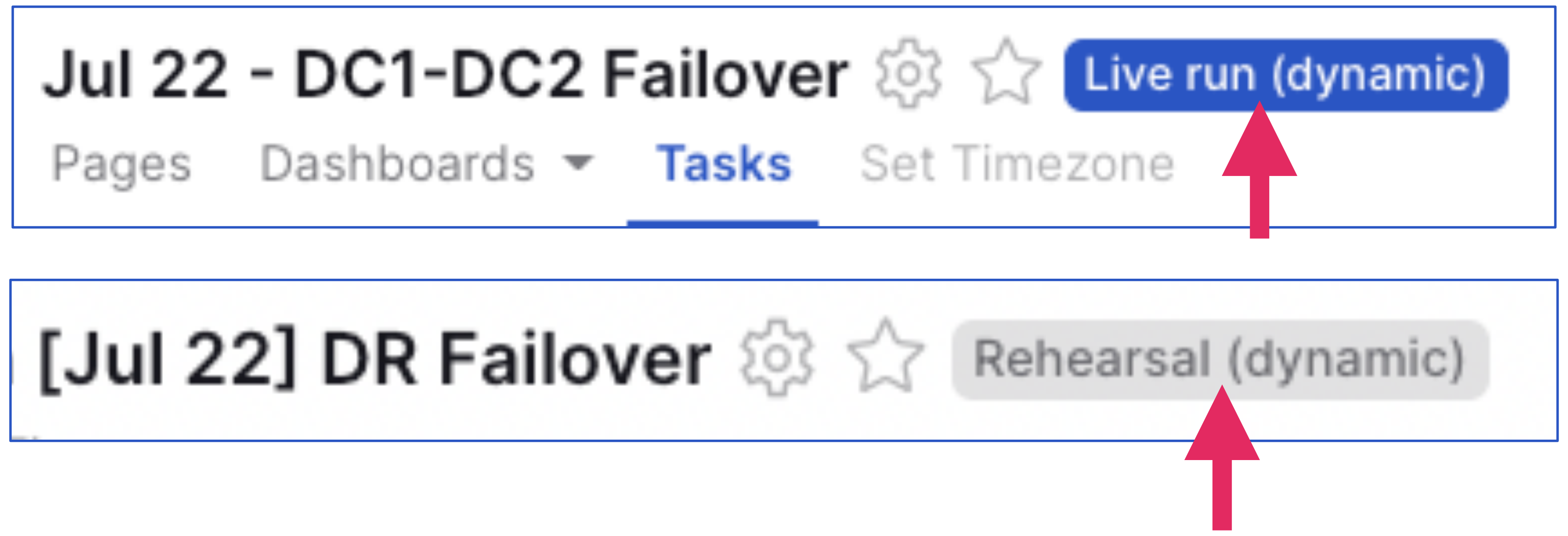
Add Snippets to tasks



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

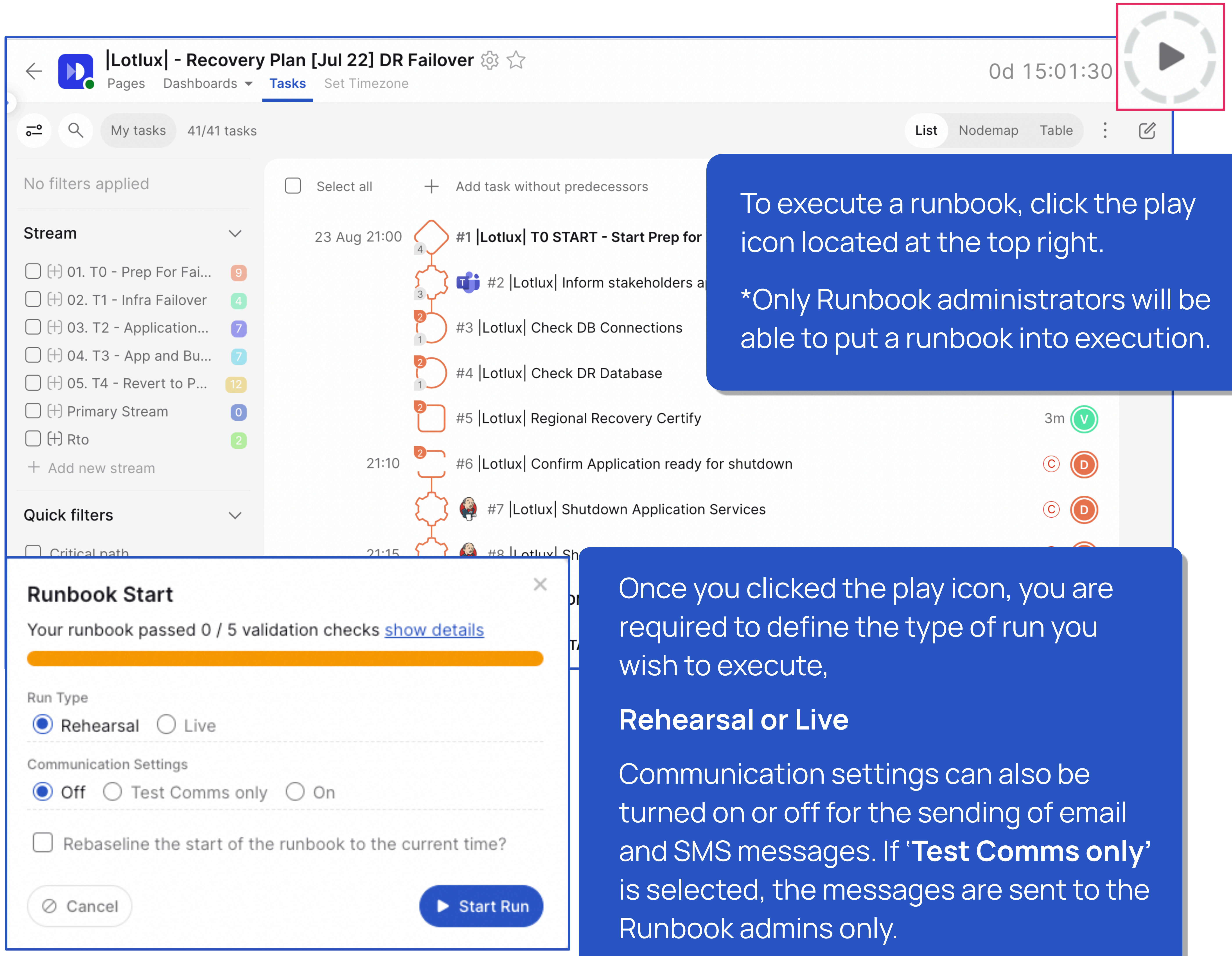
Start runbooks



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.



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.

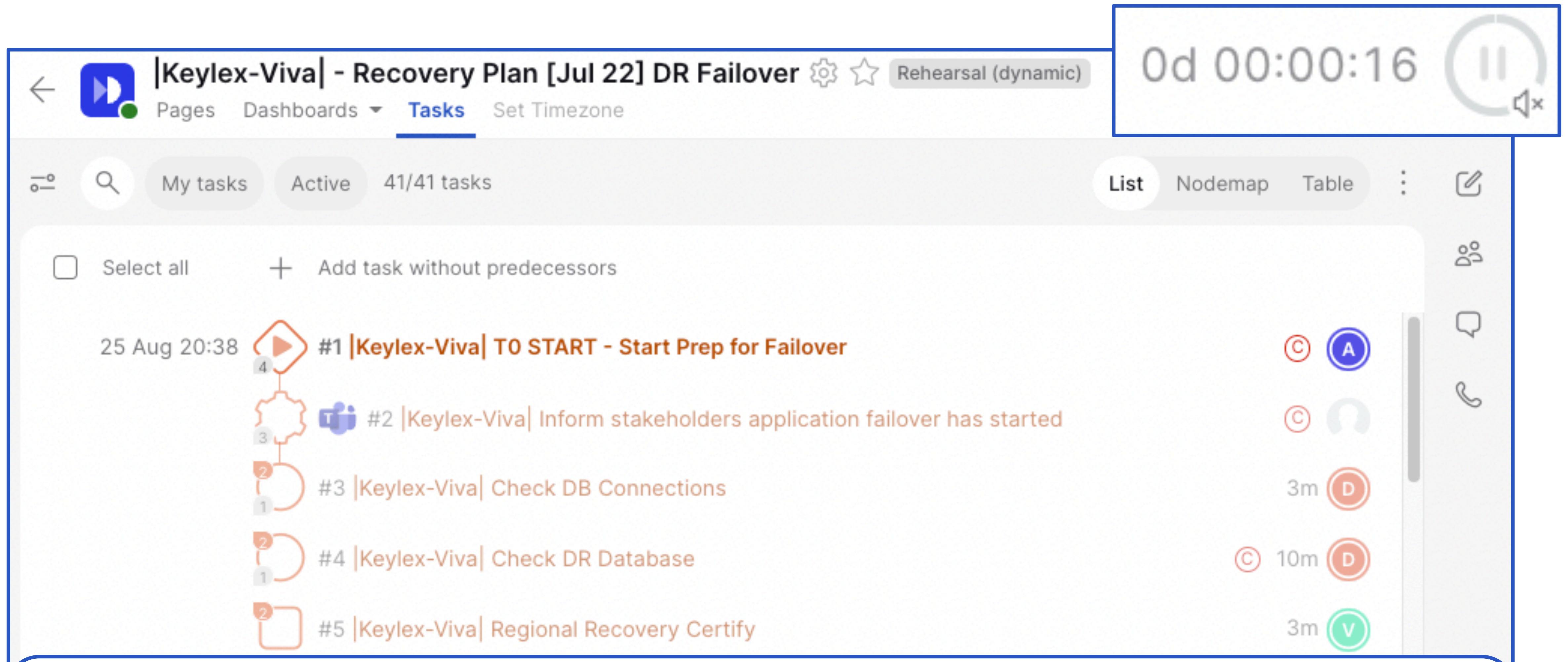
Startable tasks will have a visible play icon within the task. Only the team allocated to the task will be able to interact with it, all other users will be able to see the task but not start it. **Click on the play icon to start the task.**

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.

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



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.

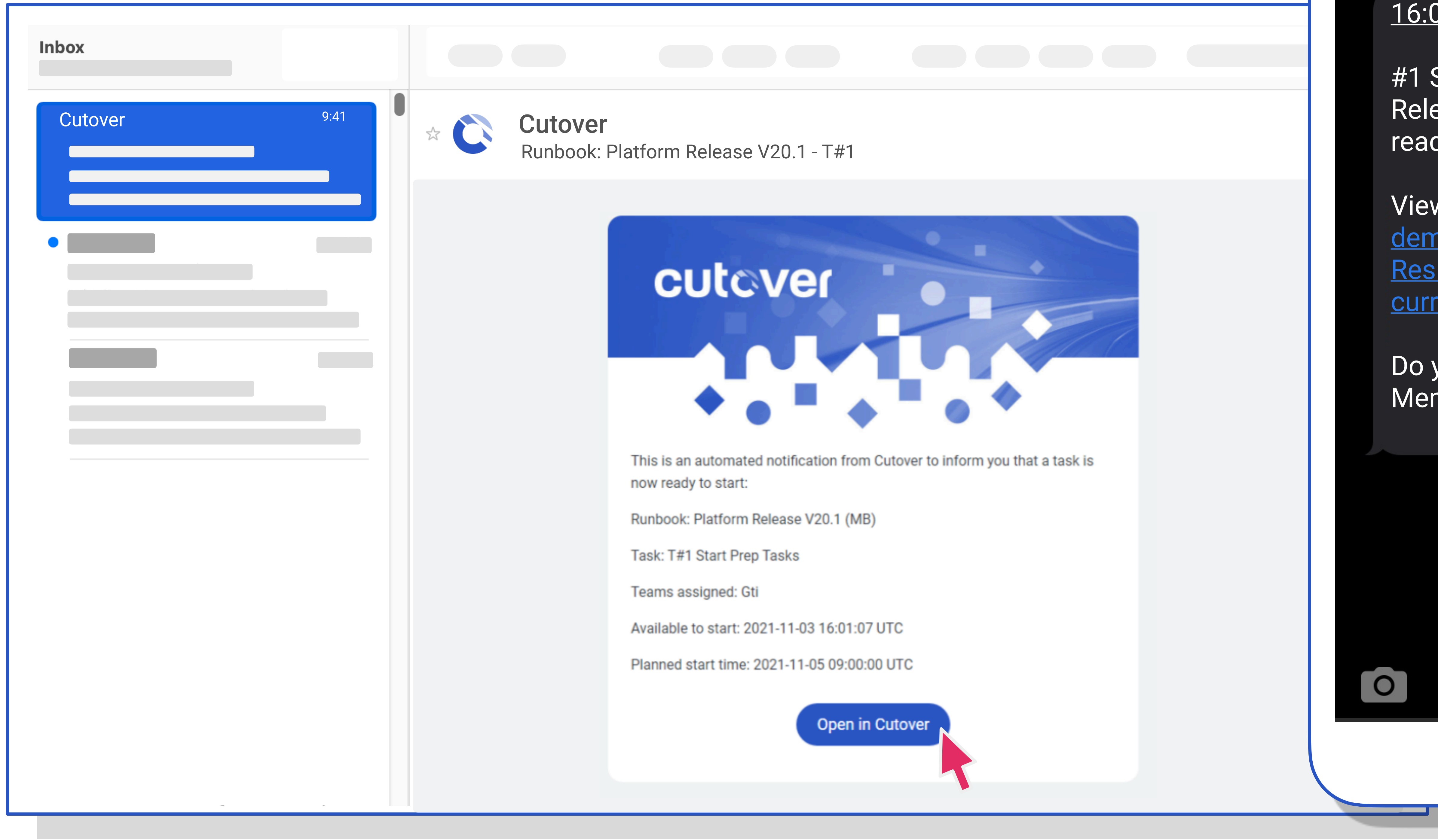
Automated Notifications

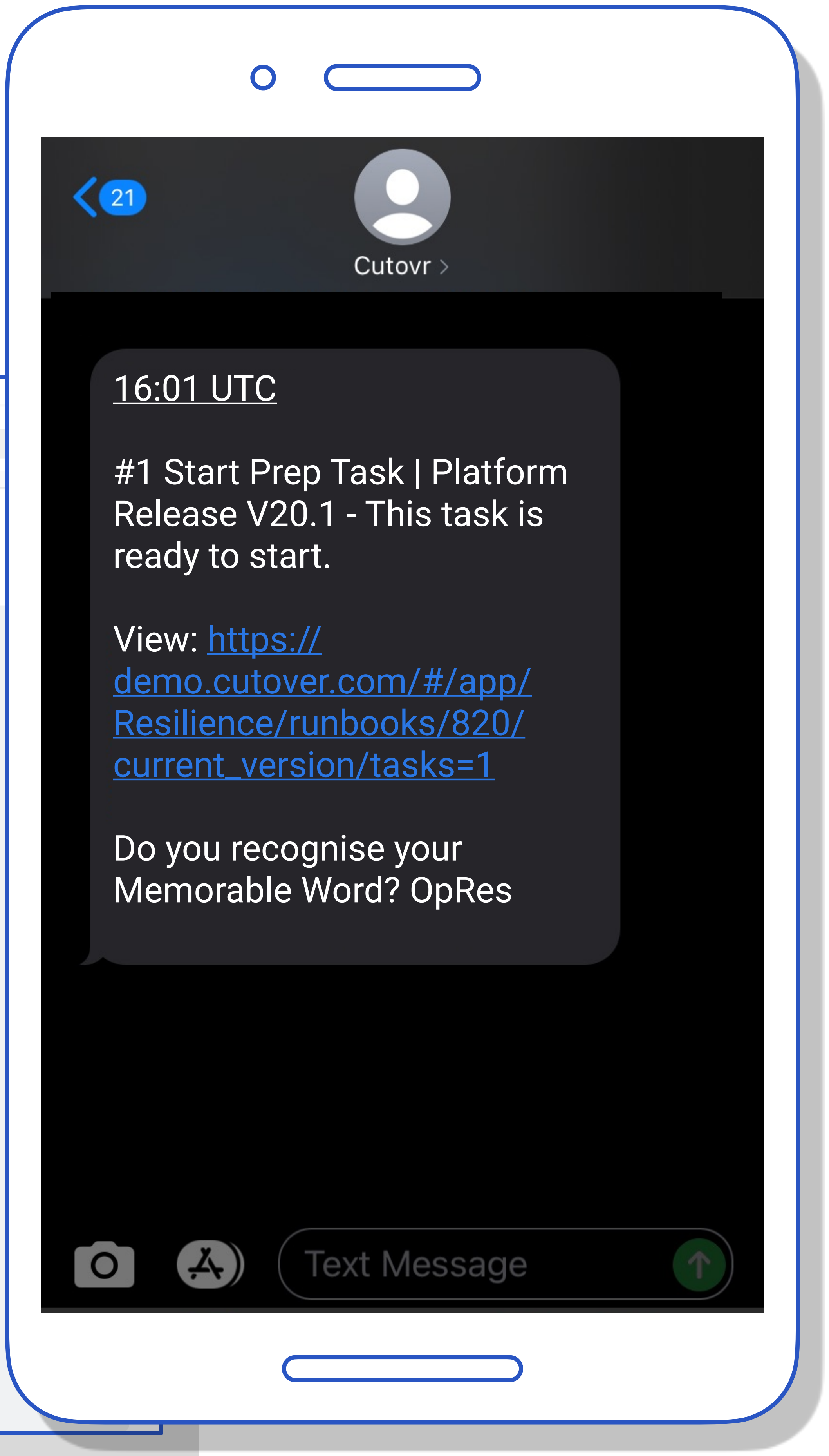
Once the runbook has been started by the Admin and they have turned on the communications options for all participants, notifications will be sent to inform the assigned team(s) or user(s) when a predecessor task has been completed and the assigned task has become startable as a result.

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.



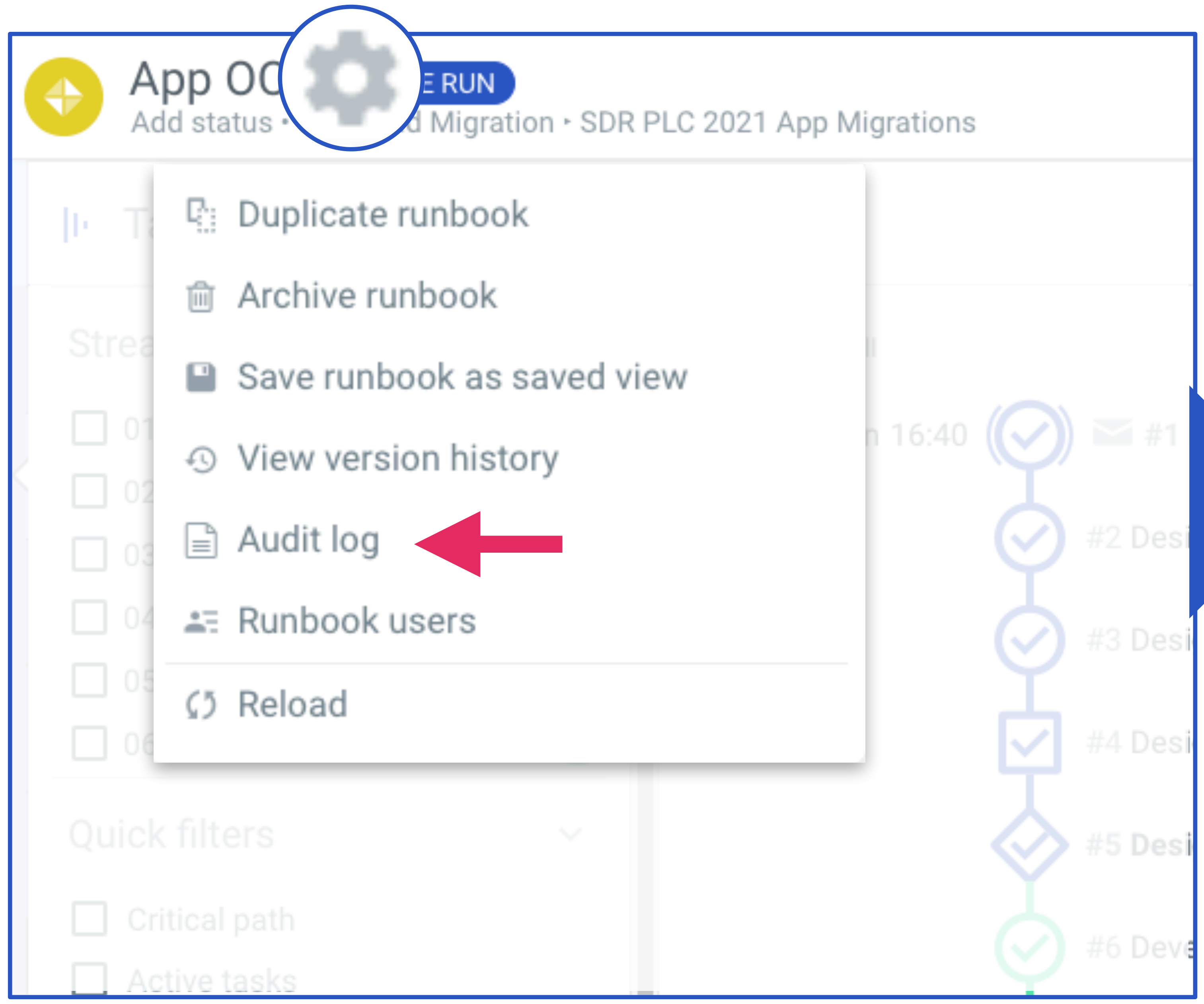


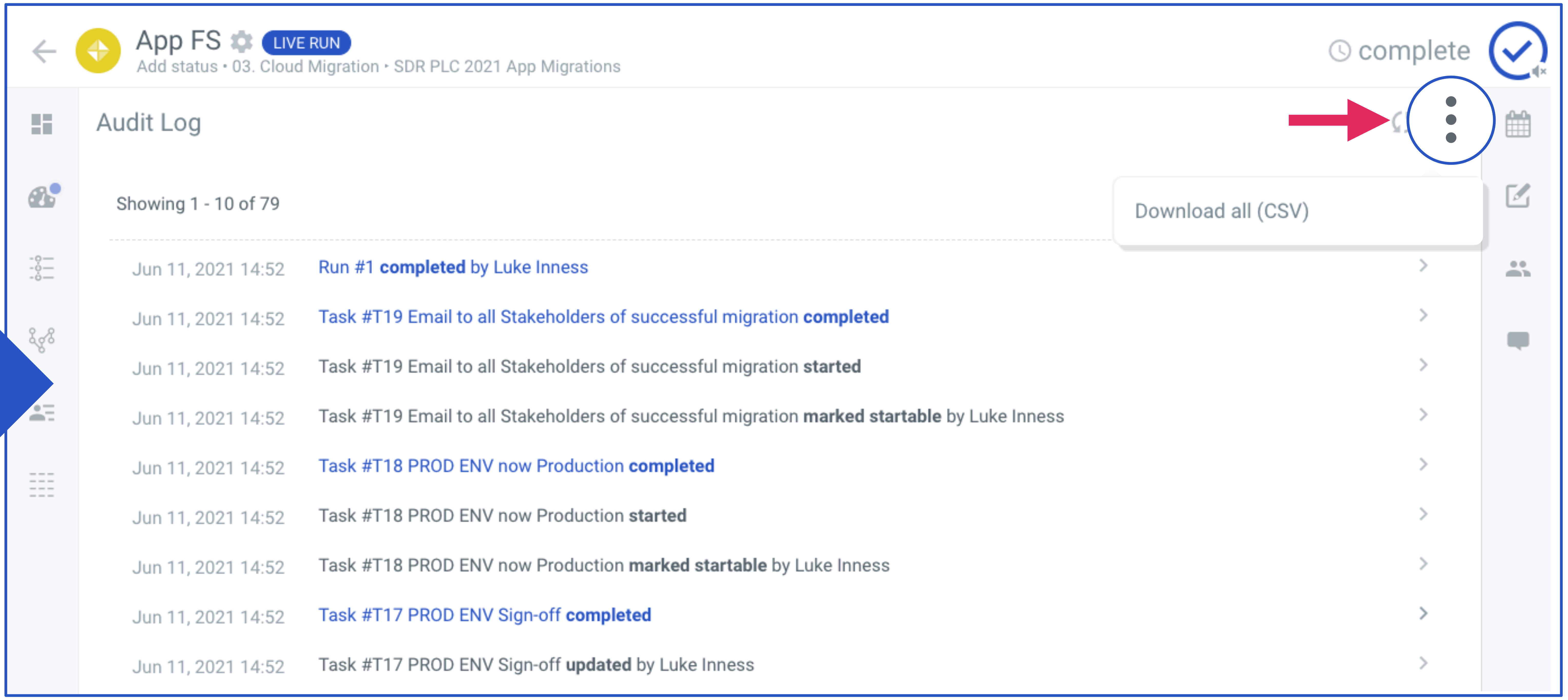
Audit log

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

Once you are in the audit log scree, 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.

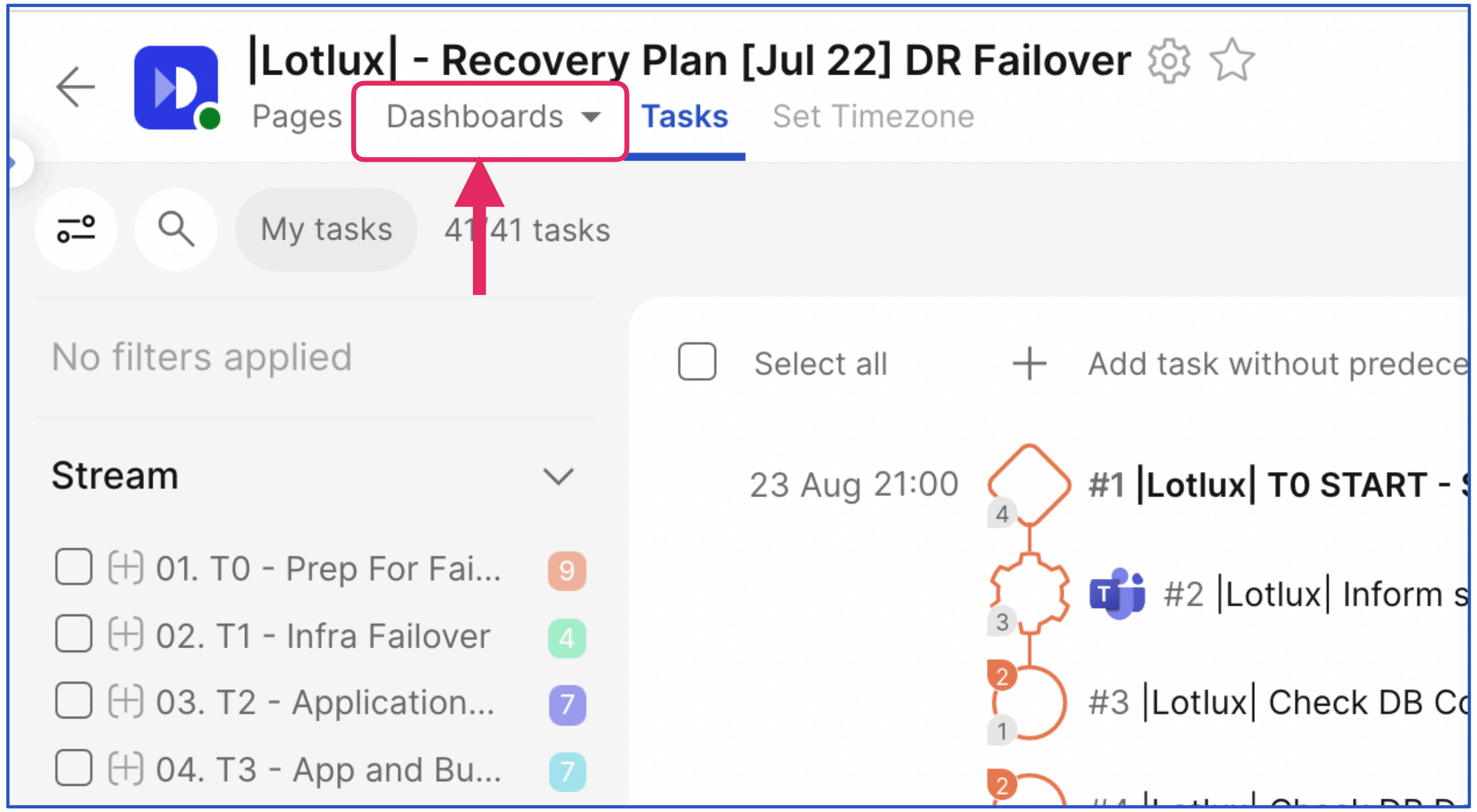


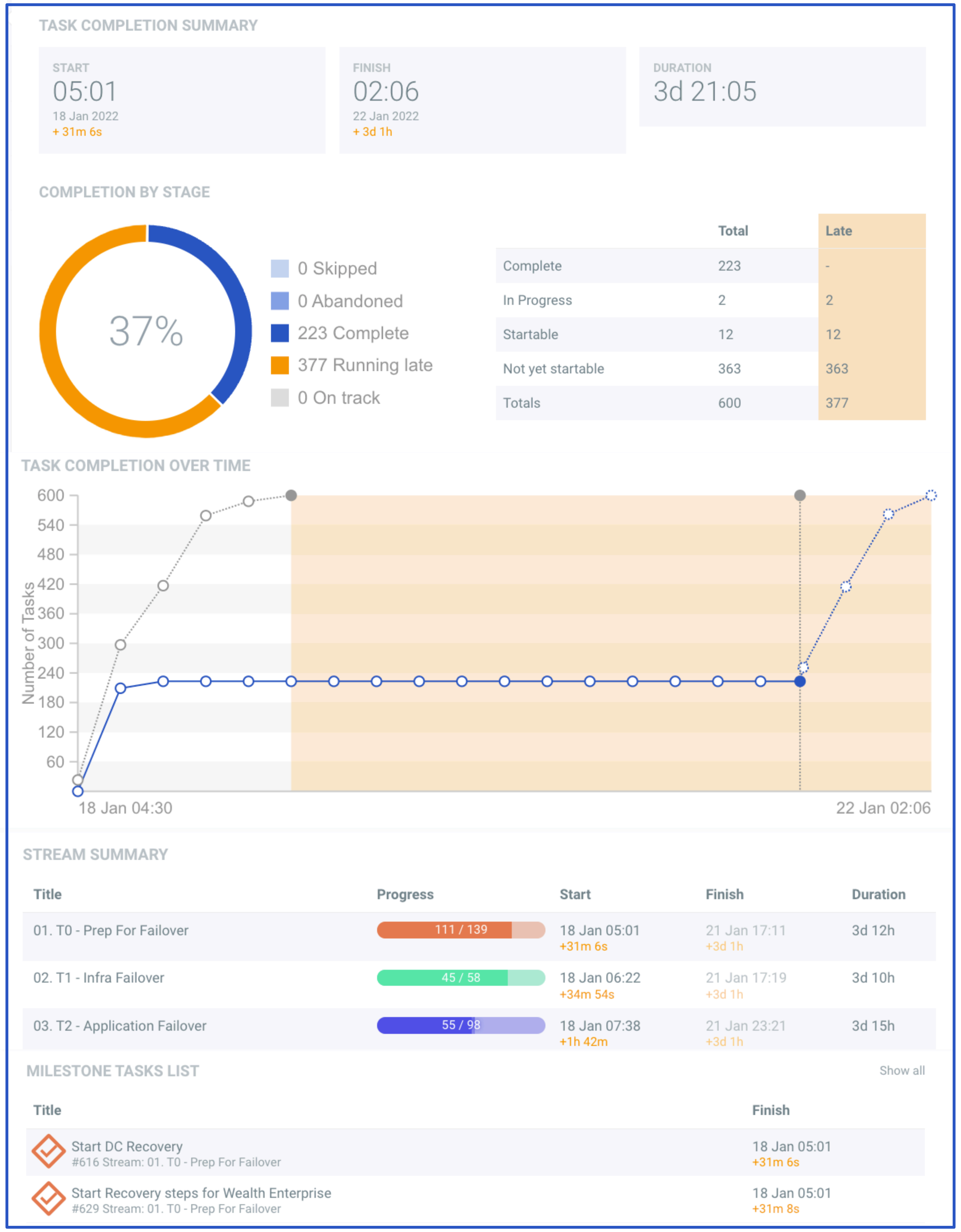


Single Runbook Dashboard

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.





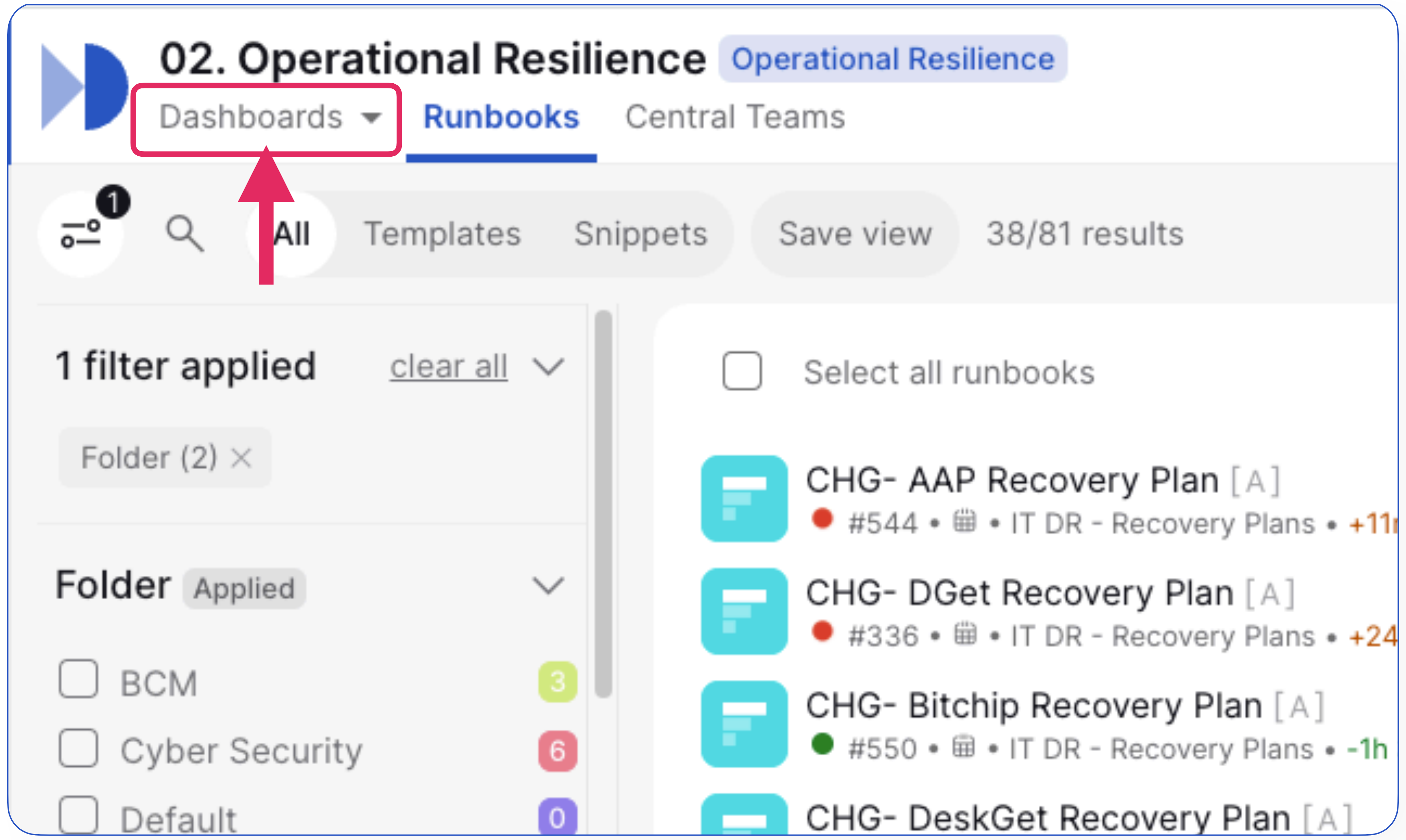
Multi-Runbook Dashboard

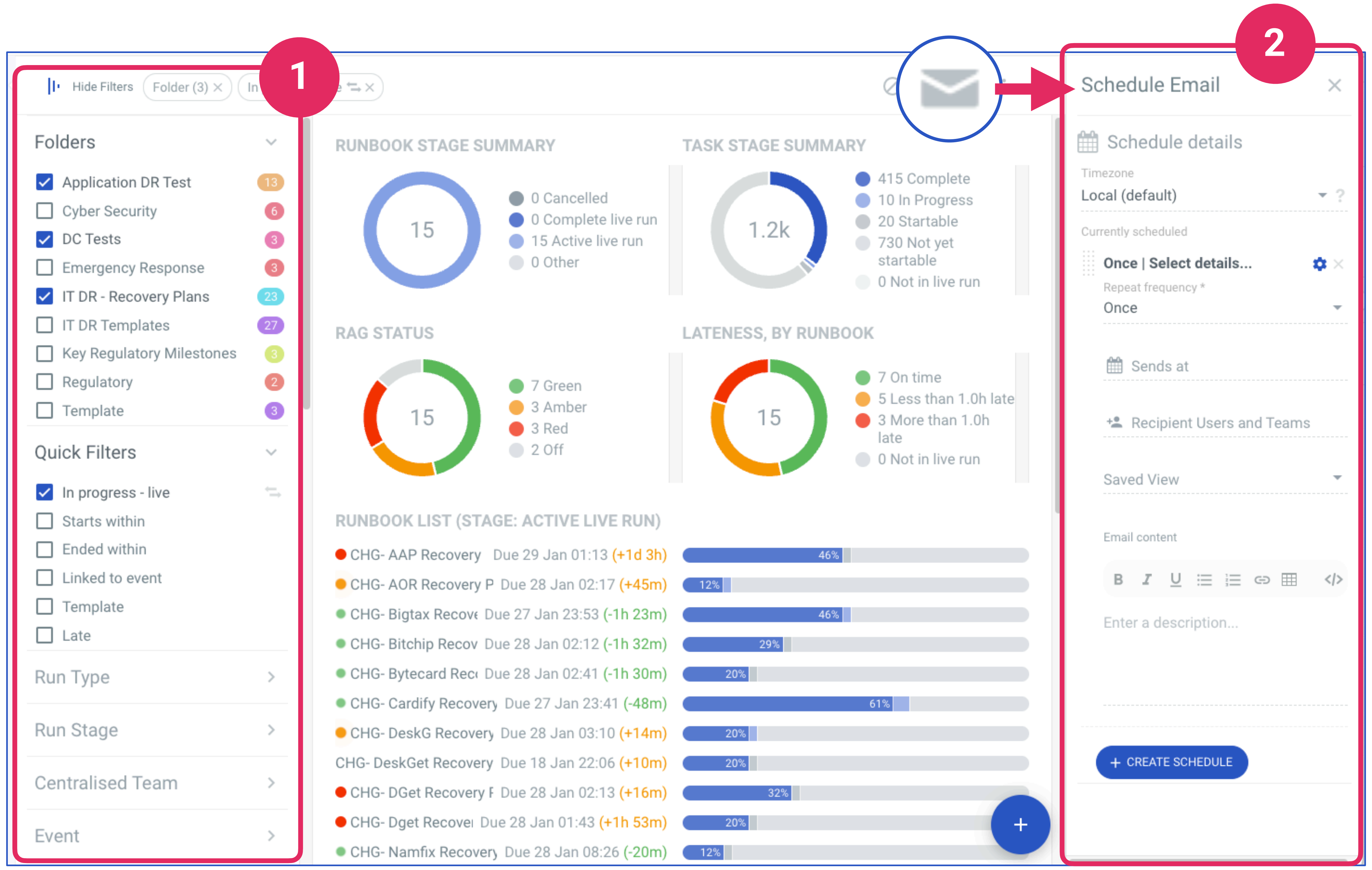
Your workspace dashboard is located within the workspace section. Select 'Dashboard' to see the Multi Runbook Dashboard.

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 Muti-Runbook Dashboard via the schedule email icon located at the top right hand side of the dashboard.

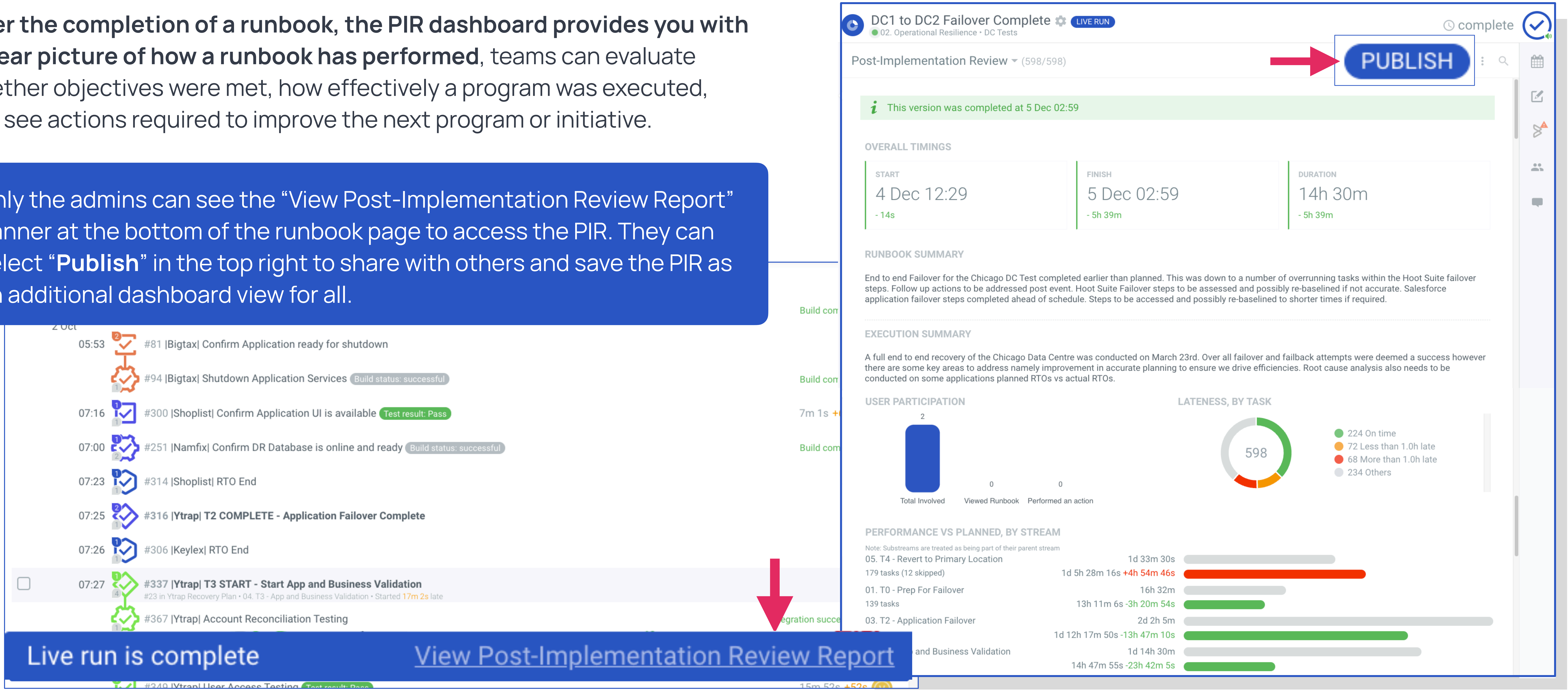




Post Implementation Review (PIR)

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.

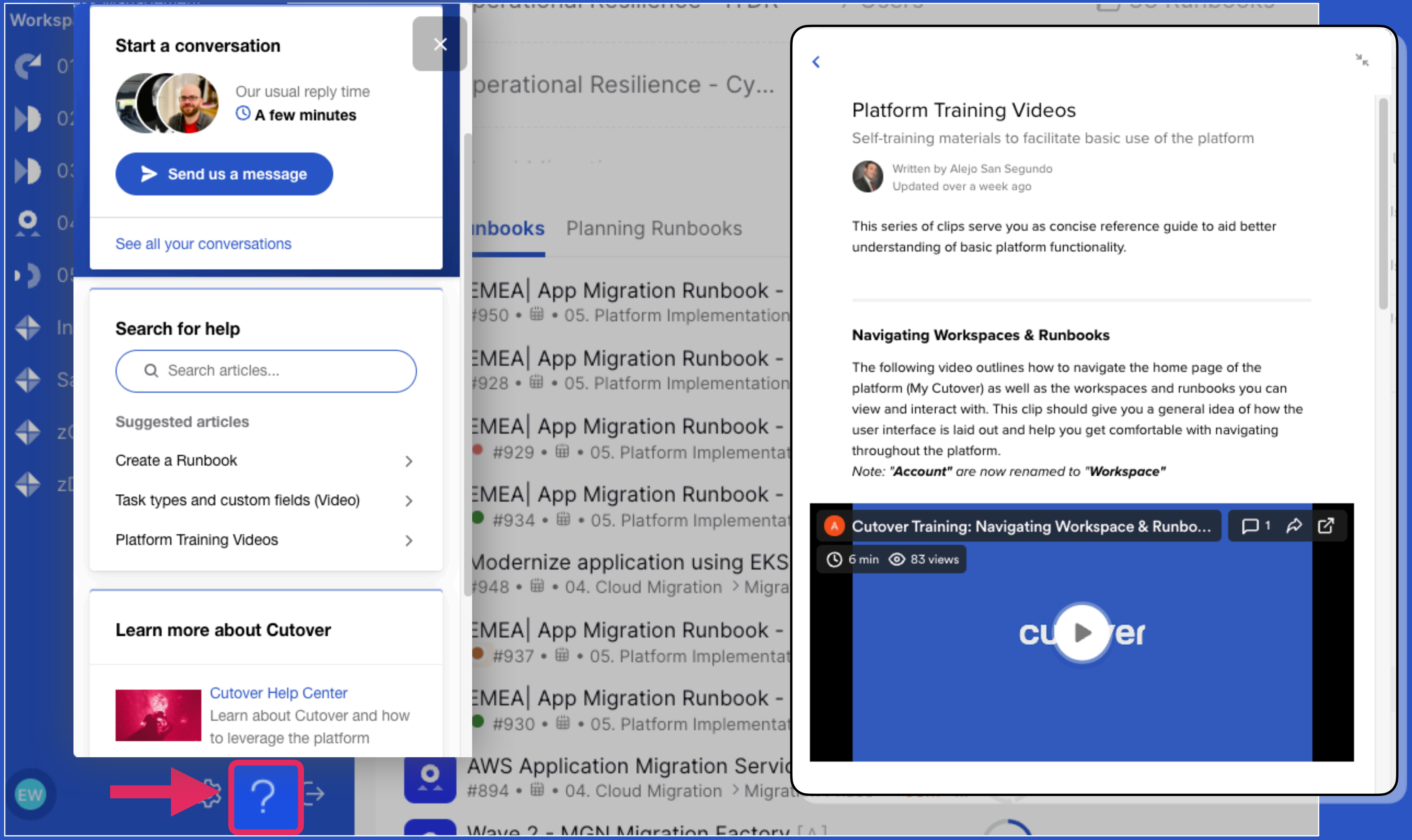


Available resources

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 for further assistance and any technical queries.

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