Cutover Facilitator Training Guide

Cutover Certification

Why?

The purpose of this document is to create a standard framework for when you conduct Cutover training sessions, in order to minimize prep work needed. This should capture all necessary features and topics during the allocated time. The framework includes five categories:

- **Different training types, purpose and expected outcome**
- **Communication templates**
- **Check list**
- **Guided training talk tracks**
- **Follow up and suggested next steps**

How can you use this?

Choose from each section in the table of contents depending on the training types you are facilitating.

Continue to next page to see table of contents

Training Types:

Training Types	Target audience	Time	Purpose	Topics
An introduction to Cutover Platform	All users	1hr	Provide all users an understanding of the Cutover platform, navigation, what to expect and how to interact with it. The session **will not** cover in depth details of runbook creation or user management but to provide clarity on what to expect and how to interact with Cutover on a basic level.	**1. What is Cutover** **2. Current use case** **3. How to access Cutover** **4. Platform overview** **5. Available resources** **6. Q&A**

Deep dive of Cutover platform management and Runbook creation	**Super/core users:** Administrators & Runbook creators	1hr - 1.5hr	Cutover deep dive focusing on platform management (general, users, runbook and template) as well as in depth walk through of runbook creation and guidance to enable users to get started. This is aimed at any users who will be responsible for managing the Cutover platform, creating runbooks and templates or anyone required to perform actions that are listed in the topics.	**1. Platform management** **2. User management** **3. Runbook creation & best practises** **4. Runbook & template management**
Cutover go live preparation	All users	45min	Similar to the introduction session, this reminder session of Cutover navigation, what to expect during go live and how to interact with it. The session is aimed at all event participants and should enable them to further familiarize with Cutover.	**1. Event/Go live outline** **2. What is Cutover** **3. How to access Cutover** **4. Platform & event runbook overview** **5. Available resources** **6. Q&A**

An introduction to Cutover

Communications template:

The below text and outline can be shared with the participants to outline what the training is for and an overview of topics. Can also include this in their training invitations and communications email.

The Cutover introduction training provides all users an understanding of the Cutover platform, navigation, what to expect and how to interact with it. The session will not go into in depth details of runbook creation or user management but will provide clarity on what to expect and how to interact with Cutover on a basic user level.

You will find below an outline of the topics that will be covered during the training session:

- What is Cutover and use cases
- How to access Cutover
- Platform overview
    - Workspace, runbook & tasks overview
    - Runbook views
- Rehearsal and Live Run
    - Notifications
    - Start and end tasks
    - Dashboard
- Available resources
- Q&A

What you need to know before the training:

1. How your trainees can access or request access to the platform, who to contact for access.
2. Ensure you have a training Runbook that you can use ahead of time.

Detailed Training Topics & Talk Track:

1. What is Cutover:

Cutover's cloud platform brings your teams, applications, and technology together, enabling you to orchestrate manual and automated activities.

Use Cutover runbooks to plan, orchestrate and analyze complex work, instead of using static spreadsheets. Cutovers high level dashboards boost transparency through providing real-time visibility.

(Optional)Cutover has been used for ITDR, Cyber Recovery, Application Release Orchestration, Cloud Migration, Platform Implementation and many other use cases.

a. Why Cutover:

Adds an overview of your use case(s), and if any historical context on why we choose Cutover.

For example: Cutover is used for delivering Rapid Migration.....

b. How to access Cutover

Quick details on how to access Cutover and how to request access.

For example: If SSO is set up, show them the Cutover login screen, then the SSO page.

2. Platform Overview (45mins):

a. Cutover homepage navigation.

i. **Workspaces. What is a workspace?**
A dedicated space for team collaboration where you can access folders, runbooks, and other features.

ii. **What is a "runbook"?**
A runbook consists of a series of tasks that are created, organized, and executed in order to carry out a specific set of actions.

iii. **Live/planning runbooks**
Shows information regarding live and upcoming runbooks **you** are associated with.

iv. **Active/upcoming tasks**
View information regarding tasks you are assigned to within any runbook.

v. **Navigation Bar (On the left)**
The blue navigation bar on the left-hand side of the homepage will always be visible on any page. This allows you to quickly navigate back to your homepage or access other menu options while in different areas of the platform.

***Highlight:**
- User profile - add/change phone number to make sure they receive SMS messages during go live
- Help - Search for Help Center articles if needed.

Once you are in a workspace **Click into a workspace*.....

b. Workspace navigation:

i. **Runbook list section & Views**
Once you are in a workspace, you should see a list of Runbook you have access to. **What you see will change depending on the roles and permissions you have been given. If you have been added to a team or assigned a task in a runbook, you should see that particular runbook.

You can change the views of the runbook list on the top right corner and switch between list, timeline and table.

ii. **Template section**
Templates can be found under the template section at the top of the workspace. If you have the right permission, you will be able to create runbooks from templates. Templates have 2 status “Approved” or “Draft”.

iii. **Filters and Folders**

Underneath the workspace icon, you should see a filter button, once you click on the filter icon, you will see a list of Folders and filter options available.

Folders help keep runbooks organized. And all you need to do is to tick the checkbox on the left to see Runbooks in a particular folder. Mention how the folders is categorized in your particular use case

Below the folders, you will see a variety of filters you can select to help you easily find the runbooks you are looking for. *Or you can use the search function (right of the filter icon).

iv. **Multi Runbook Dashboard**

The multi-runbook dashboard provides a real-time view of all runbook status within the workspace. You can use the filters to see a selection of runbooks information.

That's an overview of a Workspace, we will now give you an overview of Runbooks **Click into a Runbook you pre-prepared....*

c. Runbook navigation:

i. **Runbook at a glance:**

A runbook consists of a series of tasks that are created, organized, and executed in order to carry out a specific set of actions. You can see here, there are a few different key attributes and a few different sections:

- On the left hand side, we have the filter panels and "streams".
- In the middle we have the main Task list that shows you all the tasks and details.

- And at the very top you can see your runbook name, settings, runbook dashboard and runbook duration at the far right.

ii. **Key attributes on task list (Time, shapes, colors, assigned users & Teams)**
You can see that the task list have a few different elements:
   - **Time:** The forecasted date and time of the task will be ready to be started.
   - **Task icon:** The shape of the task icon will indicate what task type it is, normal task is a circle, milestone is a diamond. Refer to the help article “Task types and custom fields”
   - **The icon color**: indicates the assigned stream the task belongs to.
   - **Task ID and name**: The number next to the task name is the task ID. ***You can click on your task at any time to view additional details and settings. *Click on task name and show the details panel

     If you move to the right hand side of the task, you will see:
   - **Task duration:** Task duration outlines the expected time it will take for the task to complete.
   - **Assigned teams and users:** This icon will indicate which team or user has been assigned to a specific task.
   - **The task details panel that opens on the right hand side** shows you additional task information like: timings, Descriptions, dependencies, assigned users and teams and more set up by the Runbook administrator. It is a good practice to check this section for additional instructions or details.

     Mention if any details need updating or changing, who they can contact.

d. Stream & task filters:

i. **What is stream and how it can be used**

You can find Stream within the filter panel on the left of your task list.

Streams is a way of grouping tasks together. So you can easily find a group of tasks you want to see. Mention how the Stream is categorized in your particular use case/runbook

ii. **What are some key filters available? (streams, my tasks, team...etc)**

If you need to find a particular set of tasks, you can also use the other filters available below the "steam". Show them the team filter or other filters you want to highlight

***The "My Task" quick filter is available at the top to help you quickly find tasks that are assigned to you.

e. Node Map:

i. **Navigating node map and task Dependencies:**

Apart from the task list view where all the tasks appear in series: you can see your Runbook in a pictorial representation with the "Nodemap view" at the top right of your task list. This will show you all the intricacies of tasks dependencies in one view.

Clicking on the "Nodes" will give you a menu option and the "edit icon" allows you to see the Task details panel within the nodemap view. (You can zoom in and out of the node map) to see more task name...etc)

So that is all the key navigation of your workspace and runbook. Now, we will walk through some key highlights when a runbook is in rehearsal mode or in Live run.

**Start your Runbook either in rehearsal or Live

f. Rehearsal & Live run:

Once the runbook has started, you will see 2 things:

The timing on the top right changes to “Elapsed time”

The label next to your runbook name will indicate if the runbook is in rehearsal or live.

The tasks list changed; the tasks are ready to be started and will have a play icon within the task icon and the ones that are not ready, will be grayed out.

i. **Notifications:**

When Runbook starts, all participants can receive an automated message (email and SMS) to notify them the runbook has started.

Additionally, if you are assigned a task, you will also be notified when your task is ready to be started.

ii. **Start and Finish Tasks:**

Once your task is ready to be started,

- Click on the play icon to start the task.
- If your tasks has a duration, You will see the task icon goes into a “in progress state”
- Once you completed your required actions, come back to the tasks and click on the task icon again to complete. The icon will change to a check mark and the next task will be ready to start.
- Some tasks (Like the milestone, checklist) only require one click to complete.

iii. **Adding comments**

If you want to add comments during a run to your tasks, you should see a Comment icon on the right if you hover your pointer on top of the task. Add any comments in the panel that opens and hit “enter” to confirm.

iv. *****Can you “undo” when a task has been started/finished?**

If you have made a mistake of starting or completing your task, please contact your runbook administrator and let them know, they can take actions accordingly.

g. Dashboard (Real time feedback)

i. **Where to find dashboard**
You can find the single runbook dashboard underneath your runbook name at the top. It will show you a real time update and execution summary, including timeline, duration, streams...etc.

3. Help Centre resources & Ways to get support

a. **In-App Help Centre Articles [add instance URL],** via the "?" icon located at the bottom left of your screen
b. Or contact **[add contact email address/name], + other methods**

4. Q&A

Follow up email:

Thank you for attending the training, here is the recording [add recording link] for the **Cutover introduction training session**. If you have any questions or need support on how to use the tool, please visit the **In-App Help Centre Articles [add instance URL],** via the "?" icon located at the bottom left of your screen. **or alternatively contact [add contact email address/name]**

End of "An introduction to Cutover" Section

Deep dive of Cutover platform management and Runbook creation:

Communications template:

The below text can be shared with participants to outline what the training is for and to give an overview of the topics. They can also include this in their training invitations and communications email.

Cutover deep dive focuses on platform management (general, users, runbook and template) as well as in depth walk through of runbook creation and guidance to enable admin and super users to get started.

This is aimed at any users who will be responsible for managing the Cutover platform, creating, editing runbooks or templates and anyone required to perform actions that are listed in the topics:

- **Platform management**
    - Platform and workspace settings
- **User management**
    - Add and edit users permissions
- **Runbook creation & best practises**
    - Creating runbooks from new, templates & editing
    - Deep dive of runbook and task features (fixed, auto start, auto finish)
    - ***Managing runbook users, runbook teams
    - Custom fields and Custom tasks
    - Merging, upload and downloading runbooks, audit log...etc
    - Runbook in execution
- **Runbook & template management (Folders, subfolders...)**
- **Dashboard, single, multi-runbook and post implementation review**
- **Available resources, Q&A**

Detailed Training Topics & Talk Track:

Participants should already know the basic cutover platform and have attended the introduction training prior to joining this session.

Their expected roles on Cutover should be: Workspace Manager, Runbook Creator Roles, Stream editor

1. Opening

This session focuses on platform management, as well as an in depth walk through of runbook creation. This is aimed at anyone who will be responsible for managing the Cutover platform, creating, editing runbooks or templates.

You should already have an understanding of the Cutover platform, runbooks & tasks overview.

2. Platform management

Cutover offers various platform settings options. *** This section requires the users to have the Workspace Manage role.

Once you are logged into the platform, at the bottom of the blue navigation bar, you should see a settings icon.

Within the settings you will see a few different options. **Workspaces, Dashboard layouts and Runbook Types.**

Workspaces setting allows you to add users to the available workspace roles, change workspace description and type.

Dashboard allows you to create new dashboards with selected components to tailor to your requirements. Click on the “plus” and add the details and select components from the menu selection. *** Make sure you select the “visibility” section to your workspace.

Runbook Type: You can tailor workspaces by adding any number of different runbook types. For example, if your workspace is being used for various migration activities, you can create a variety of runbook types for each stage.

New runbook types can be created by clicking the + icon to create a new runbook type.

3. User management

a. Run through of the “user” tab and how to add and upload users

A Global User Admin or Workspace Manager has the ability to view and create new users within their respective Workspaces. This can be done in the Access Management area.

To invite a new user, A create button at the bottom right of the screen displayed as a ‘+’ icon will enable the invite of new users via completion of a New User form.

To upload more than one user, please choose the **Bulk upload option**:
Click on Choose file and add your pre-prepared CSV file to be uploaded. the CSV file must contain the column headers first_name, last_name and email. Once you have selected your file, add your roles, login options and notification settings

Edit a user by clicking on their row in the Users table and opening the right-hand panel. This table is searchable by clicking on the search icon and searching by name or email address.

Archive a user: Global user admin roles can archive users by clicking the "archive" button located at the top right-hand side of the user details pane.

Workspace Managers can remove roles from the workspaces they manage. This can be done by unchecking the box next to the role you wish to remove. If the user has no other roles in Cutover, they will be archived completely.

b. User permissions (workspace managers, runbook creators,

runbook members)
The following role type categories are available for users in the Cutover platform:

Global
Workspace
Folder
Runbook
Centralized team
Integrations
Custom fields

Within each category, there are specific roles that can be assigned to suit your organization's structure. Additionally, you have the ability to assign multiple roles to the same user.

You should be able to see the description of each role within the tool tip "?" on the right hand side of the role name. Or you can get more details about the cutover roles & permissions within the help center.

4. Runbook creation & best practises

a. **Utilize Workspaces and folders**
Users with the Workspace Manager role type are able to create and manage folders and subfolders:

Folders allow you to organize runbooks in your workspace into collections that make sense for your workflow and team needs

To create a folder: click the filter icon > +Add new folder under the Folder section, then Enter a title for your folder.

To create a subfolder, click the [+] plus icon under the parent folder name. Enter a title for your subfolder and press Enter to save your changes

b. **Creating runbooks from new**

To create a runbook in Cutover, you will need to have the

Workspace Runbook Creator or Folder Runbook Creator role type at minimum.

To create a runbook, Click “+Create Runbook” on the top right-hand corner of your workspace.

Select a runbook type, then you’ll be asked to select an existing template to create your runbook from or you can choose to start a new blank runbook.

In the next screen, select a default start time or start date. Once finished, your runbook will be created. If you are unsure, leave it on plan only and you can add a start date at a later date.

When a runbook creator creates a new runbook or from a template, they automatically become the “Runbook Admin” which allows them to edit and add additional Runbook admins.

c. **Runbook and task features:**
Once you have your Runbook (blank or from a template), you can start adding tasks

Note: Trainees should already have understanding of the key elements of the runbooks and tasks, please refer to “**Key attributes on task list (Time, shapes, colors, assigned users & Teams)” in the “Cutover introduction” session if needed.**

On screen, Show adding a tasks:
You can add tasks by clicking the + inside the task icon and a successor tasks will be added below, type in the task title and press enter confirm. You can then click on the task title to go to the details panel.

Go through the details of the “Task Details” panel, and highlight the Streams, Task Types (Bring up the task type articles here), dependencies, assign users and teams.

*****Task Dependencies (Important to go through):**

Dependencies are critical in Cutover runbooks to ensure the

timing and the flow of your processes are in order, therefore mapping out the correct predecessors are crucial in successful runbook planning and execution.

If you want to perform a set of four tasks at the same time, it means that the four tasks will have the same predecessors. Once the predecessors completes, all four tasks will be ready to start.

To map dependencies for tasks, go to the task details panel and search & enter the task ID, or task title in the predecessor option.

d. **Setting up steams**
Streams and substreams organize runbook tasks into groups. Not only does this allow a runbook plan to be built in sections.

The Primary Stream is created as the default stream and can be renamed. All tasks in the runbook must be assigned to a stream and can only be assigned to a single stream or substream at one time.

To edit a specific stream name and settings, click the edit icon next to the stream title

To create a substream within a specific stream, click the plus (+) icon next to the stream you'd like to create a substream under.

e. **Managing runbook users**

When in a runbook, Runbook Admins can select the **"View Users/Teams"** icon located at the right hand side of your window and will display all Runbook users, their permissions and teams in one place.

Once you are in the "View Users and Teams" panel, select the + icon located at the top right-hand corner of the panel, the modal will appear **which allows you to add new users** (as runbook admin or stream editor) and new teams within the same view. Just search for a Central team, create a custom team or add users as Runbook admins. Go through the options on the pop up

The panel displays how many users or teams you have in a runbook. You can switch the views by clicking on either the **Users** tab or the **Teams** tab.

Select the “Teams” tab and a list of existing teams will display along with the numbers of users in each team.

Click on the team name will open up the team details panel which includes: Team type (linked team or custom team), team title, option to unlink the team if it is a linked team, a list of team members, and add or remove team members if it is a custom team.

The “3-dot” icon located at the top right-hand side of the team details panel allows the admin to delete and replace the team with a linked team. If the admins have a role assigned to edit central teams (i.e workspace manager or centralized team manager), an additional “Edit Central team” option will be available for any linked teams in the runbook.

If the “Users” tab is selected, you should see a list of runbook admins, steam editors, and team members.

Selecting the permission label allows you to change the permissions for each user.

Click on the user’s name will open the “user details” panel and you can see what team(s) they are in within this runbook.

The “3-dot” icon located at the top right-hand side of the user details panel allows the admin to delete the user from this runbook.

Click on the “X” next to the team name underneath will remove the user from the custom runbook team. * You cannot remove users from linked teams in this view, please edit your linked team members via the “Centralised Teams” settings.

From here you can click and drag the users & teams avatar to tasks to assign.

f. **Custom fields**

You can use custom fields to capture additional information you need at both a runbook and task level. For example, you may want your runbook to display and make use of information beyond the standard fields that are already available to you, or to capture information that is stored by another system that you use or integrate with. If you need to create additional Custom Fields, please contact your AWS account team.

g. **Runbook Settings:**

Next to you runbook name, you should see a settings icon, within that you will find a few options:

To import tasks via CSV. This can be useful when creating a runbook from scratch or appending tasks to an existing runbook. click the cog icon next to the title of your runbook > Import tasks from CSV. **** You will need to use the Cutover Task upload CSV Template before uploading your tasks**

Side note: To export your task list: Click More Actions "3 dots" located next to the task list view options > Export tasks.

Converting an existing Runbook into a Template - choose the "Make template" option.

There are many other options available within the runbook settings, you can access the runbook Audit log, add a schedule start for your runbook, import runbook (import another runbook into the existing - merging them). Encourage you to explore some of the options.

5. Executing Runbooks

Once planning is complete and the runbook is ready to start, a runbook administrator can initiate the runbook using the Play icon located on the top right of the runbook. Start the demo runbook.

The timing on the top right changes to "Elapsed time"

The label next to your runbook name will indicate if the runbook is in rehearsal or live.

Rehearsal can be executed as many times as you wish. This helps administrators identify any changes needed prior to the live event and enables all participants to familiarize themselves 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.

The tasks list changed; the tasks are ready to be started and will have a play icon within the task icon and the ones that are not ready, will be grayed out.

When a run has begun, **the play button changes to a pause button enabling admins to pause or cancel a run**, should the need arise to adjust any part of the plan during a run. A message will display to give the option to either pause or cancel the run.

Notifications:
If you have chosen the option "On" in the "Communications Settings" in the message before the runbook starts - When Runbook starts, all participants can receive an automated message (email and SMS) to notify them the runbook has started.

Additionally,anyone with an assigned task, They will also be notified when the task is ready to be started.

When a runbook is canceled, a red notification appears at the bottom of the runbook. Should you want to use the runbook again, you must duplicate the runbook.

Start and Finish Tasks:
Once a task is ready to be started,

1. Click on the play icon to start the task.
2. If your tasks has a duration, You will see the task icon goes into a “in progress state”
3. Once you completed your required actions, come back to the tasks and click on the task icon again to complete. The icon will change to a check mark and the next task will be ready to start.
4. Some tasks (Like the milestone, checklist) only require one click to complete.

   ***Runbook admins can override and start + complete any tasks on the runbook.

Adding comments
If anyone wants to add comments during a run they should see a Comment icon on the right if they hover the pointer on top of the task. Add any comments in the panel that opens and hit “enter” to confirm.

ii. *****Can you “undo” when a task has been started/finished?**
If you have made a mistake of starting or completing your task, please contact your runbook administrator and let them know, they can take actions accordingly.

If the run is a Live run, once all the tasks in a runbook are

complete, the runbook status indicator shows complete, and a blue notification appears at the bottom of the window notifying the user of completion. At this point, you cannot edit the runbooks/tasks anymore.

6. Create Saved Views for Your Workspace:

a. **Setting up public saved views**

Workspace managers have the ability to allocate a saved view they've created to a public group, making it visible to all workspace members. However, workspace managers do not have access to private views other members have created.

To create a saved view, Apply filters within workspace, Click “Save View” Option next to the Workspace filter icon.

To create a public saved view group: go to the blue navigation bar on the left, underneath the workspace title, you should see a “ + add public group”. Once you have created the public group, you will be able to save views under it for all workspace to access.

Dashboards: single, multi-runbook and post implementation review

A multi-runbook dashboard is created at the workspace level and consists of several distinct components, providing various ways to track progress and identify potential problem areas. You can click on some components to see more details (list of runbooks...etc). You can also customize and create new Multi-Runbook dashboards with different components.

A Post Implementation Review (PIR) is conducted after completing a runbook; and it is used to evaluate whether objectives were met, how effectively the activity was run, and lessons learned. At Cutover, this is enabled through our PIR dashboard.

Runbook Admins need to first publish the PIR dashboard after the Runbook is completed to make it available to all other runbook members.

Single Runbook Dashboard can be found underneath your runbook name at the top. It will show you a real time update and execution summary, including timeline, duration, streams...etc.

End of Training -

Q&A

Follow up email and resources:

Thank you for attending the Cutover deepdive training for admins and super users, here is the recording [add recording link] for the training session. If you have any questions or need support on how to use the tool, please visit the **In-App Help Centre Articles [add link to instance URL]** via the "?" icon located at the bottom right of your screen.

*If you have any questions or would like to discuss additional custom fields or setting up new workspaces, possible integrations. Please contact [Add contact]

End of "Deep dive of Cutover" Section

Cutover event preparation

Communications template:

The below text and outline can be shared with participants to outline what the training is for and an overview of topics. They can also include this in their training invitations and communications email.

You are receiving this invite because you are participating in the [Event name, date and time].

The Cutover event preparation training provides all users an understanding of the Cutover platform, navigation, and how to interact with it. The session will provide clarity on what to expect during the event and how to interact with the Cutover platform on a basic user level. It is not intended as a deep dive into the platform. The below outlines the topics that will be covered during the training session:

- **Event outline**
- **What is Cutover**
- **How to access Cutover**
- **Platform & event runbook overview**
- **Available resources**
- **Q&A**

What you need to know before the training:

1. Event Runbooks/details to use for the session
2. Make sure you have ALL participants included in the event
3. Suggest to record and share the training

4. How users can access or request the access to the platform, who to contact.
5. At least one event admin to be present for any customer specific questions and opening remarks.

Detailed Training Topics:

What is Cutover:

Some of you here might be familiar with Cutover and some of you may not have interacted with Cutover before.

For those of you who are not familiar with Cutover - Cutover's cloud platform brings your teams, applications, and technology together, enabling you to orchestrate manual and automated activities across your organization.

Cutover is being used as the orchestration tool for [**event/project name**]. ***Give an overview of the event.**

So, for this training session, we will walk through an overview of the platform and what to expect during the go live. If you have any questions during the session, please feel free to ask.

Platform Overview:

a. How to access Cutover

Quick details on how to access, what's the URL for Cutover and how to request access. *Show log in (SSO or Standard email method)

b. Cutover homepage navigation.

i. **Workspaces. What is a workspace?**
A dedicated space for team collaboration where you can access folders, runbooks, and other features.

ii. **What is a “runbook”?**
A runbook consists of a series of tasks that are created, organized, and executed in order to carry out a specific set of actions.

iii. **Live/planning runbooks**
Shows information regarding live and upcoming runbooks **you** are associated with, clicking on the Runbook title will directly take you to the Runbook.

iv. **Active/upcoming tasks**
**Shows you tasks you are assigned to within any runbook. You can click on the tasks and it will take you directly to the task within the Runbook. This is the quickest way to access.

v. **Navigation Bar (On the left)**
The blue navigation bar on the left-hand side of the homepage will always be visible on any page. This allows you to quickly navigate back to your homepage or access other menu options while in different areas of the platform.

*__Highlight:__

- **Make sure you review your User profile** - add/change phone numbers, country code to make sure you can receive SMS messages during go live
- Help - Search for Help Center articles if needed.

c. Workspace navigation:

i. **Runbook list section & Views**
Once you are in a workspace, you should see a list of Runbooks you have access to. **What you see will change depending on the roles and permissions you have been given. If you have been added to a team or assigned a task in a runbook, you should see that particular runbook.**So if**

you are expecting to see a particular Runbook and it's not on the list, please speak to [name/contact]

You can change the views of the runbook list on the top right corner and switch between list, timeline and table.

ii. **Filters and Folders**

Underneath the workspace icon, you should see a filter button, once you click on the filter icon, you will see a list of Folders and filter options available.

Folders help keep runbooks organized. And all you need to do is to tick the checkbox on the left to see Runbooks in a particular folder. Explain how the folders is categorized in the particular workspace

Below the folders, you will see a variety of filters you can select to help you easily find the runbooks you are looking for. *Or you can use the search function (right of the filter icon).Highlight any filters you think participants will find useful to search for the event Runbook.

d. Runbook navigation:

i. **Event Runbook (go to your event Runbook):**

This is an example of the runbook we will be using. It consists of a series of tasks that are created, organized, and executed in order to carry out a specific set of actions. You can see here, there are a few different key attributes and a few different sections:

- On the left hand side, we have the filter panels and "streams".
- In the middle we have the main Task list that shows you all the tasks and details.
- And at the very top you can see your runbook name, settings, runbook dashboard and runbook duration at the far right.

ii. **Key attributes on task list (Time, shapes, colors, assigned users & Teams)**

You can see that the task list have a few different elements:

- **Time:** The forecasted date and time of the task will be ready to be started.
- **Task icon:** The shape of the task icon will indicate what task type it is, normal task is a circle, milestone is a diamond. Refer to the help article "Task types and custom fields"
- **The icon color**: indicates the assigned stream the task belongs to.
- **Task ID and name**: The number next to the task name is the task ID. ***You can click on your task at any time to view additional details and settings. *Click on task name and show the details panel

  If you move to the right hand side of the task, you will see:
- **Task duration:** Task duration outlines the expected time it will take for the task to complete.
- **Assigned teams and users:** This icon will indicate which team or user has been assigned to a specific task.
- **The task details panel that opens on the right hand side** shows you additional task information like: timings, Descriptions, dependencies, assigned users and teams and more set up by the Runbook administrator.
  It is a good practice to check this section for additional instructions or details to let participants know if you have Customer fields or Descriptions you want them to watch out for.

  Mention if any details need updating or changing, who they can contact.

e. Streams & task filters:

i. **What is stream and how it can be used**
You can find Stream within the filter panel on the left of your task list.

Streams is a way of grouping tasks together. So you can easily find a group of tasks you want to see. ** Mention how the Stream is categorized in your particular runbook

ii. **What are some key filters available? (streams, my tasks, team...etc)**
If you need to find a particular set of tasks, you can also use the other filters available below the "steam". **Show them the key filters you want to highlight**

***** If you want to familiarize yourself with the tasks that you are assigned. The "My Task" quick filter is available at the top to help you quickly find tasks that are assigned to you**.

f. Node Map:

i. **Navigating node map and task Dependencies:**
Apart from the task list view where all the tasks appear in series: you can see your Runbook in a pictorial representation with the "Nodemap view" at the top right of your task list. This will show you all the intricacies of tasks dependencies in one view.

g. Rehearsal & Live run:

i. Once the runbook has started, you will see 2 things:

The timing on the top right changes to "Elapsed time"

The label next to your runbook name will indicate if the runbook is in rehearsal or live.
The tasks list changed; the tasks are ready to be started

and will have a play icon within the task icon and the ones that are not ready, will be grayed out.

- **Notifications:**
  When Runbook starts, all participants can receive an automated message (email and SMS) to notify them the runbook has started.
  Additionally, if you are assigned a task, you will also be notified when your task is ready to be started.
- **Start and Finish Tasks:**
  Once your task is ready to be started,
  - **a.** Click on the play icon to start the task.
  - **b.** If your tasks has a duration, You will see the task icon goes into a "in progress state"
  - **c.** Once you completed your required actions, come back to the tasks and click on the task icon again to complete. The icon will change to a check mark and the next task will be ready to start.
  - d. Some tasks (Like the milestone, checklist) only require one click to complete.
- **Adding comments**
  If you want to add comments during a run to your tasks, you should see a Comment icon on the right if you hover your pointer on top of the task. Add any comments in the panel that opens and hit "enter" to confirm.
- ******Can you "undo" when a task has been started/finished?***
  If you have made a mistake of starting or completing your task, please contact your runbook administrator/account team and let them know, they can take actions accordingly.

h. Dashboard (Real time feedback)

i. Where to find dashboard

You can find the single runbook dashboard underneath your runbook name at the top. It will show you a real time update and execution summary, including timeline, duration, streams...etc.

Help Center,support and training resources

If you have any questions or need support , **please contact [add contact]** or if you have any questions regarding the Cutover platform, please visit Cutover's **In-App Help Center articles [add link to company instance URL]** via the "?" icon located at the bottom right of your screen.

Closing statement from admins around event details...ect

Follow up email and resources:

Thank you for attending the training, here is the recording [add recording link] for the **Cutover: [Event name]** training session.

If you have any questions or need support , please contact your account team or if you have any questions regarding the Cutover platform, please visit Cutover's **In-App Help Center articles [add link to company instance URL]** via the "?" icon located at the bottom right of your screen.

Here is a quick guide on how to execute your tasks on Cutover: Cutover Task Executor Guide (PDF)

End of "Cutover Event Preparation " Section

Document History

Version	Date	Author/reviewer	Comment
v1	September 2023	Cutover	