

Cutover Quick Start Guide



Welcome to Cutover

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

What is Cutover?

Standardize and automate your technology operations processes such as IT and cyber disaster recovery, release management, and cloud migration. Bridge the gap between your teams and technology to increase efficiency and reduce risk with Cutover's automated runbooks.

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

Click on the subheading to skip to the specific content page

General Introduction

- Accessing Cutover
- Homepage Overview
- Navigation Bar
- User Management

Workspace

- Workspace Overview
- Workspace Section
- Central Teams
- Workspace Views
- Folders and Filters

Runbook

- Runbook Overview
- Runbook Section
- Nodemap
- Streams, Filters and Runbook teams

Create Runbook

- Create Templates
- Create Runbook and Edit Tasks
- Edit Streams and Runbook Teams
- Import and Export Tasks
- Snippets
- Linked Runbook

Execute Runbooks

- Start Runbooks
- Execute Tasks
- Automated Notification

Reporting

- Audit Log
- Single Runbook Dashboard
- Multi-Runbook Dashboard (MRD)
- Post Implementation Review (PIR)

Links to Help Centre and available Resources



Accessing Cutover

Authentication methods

Email and password

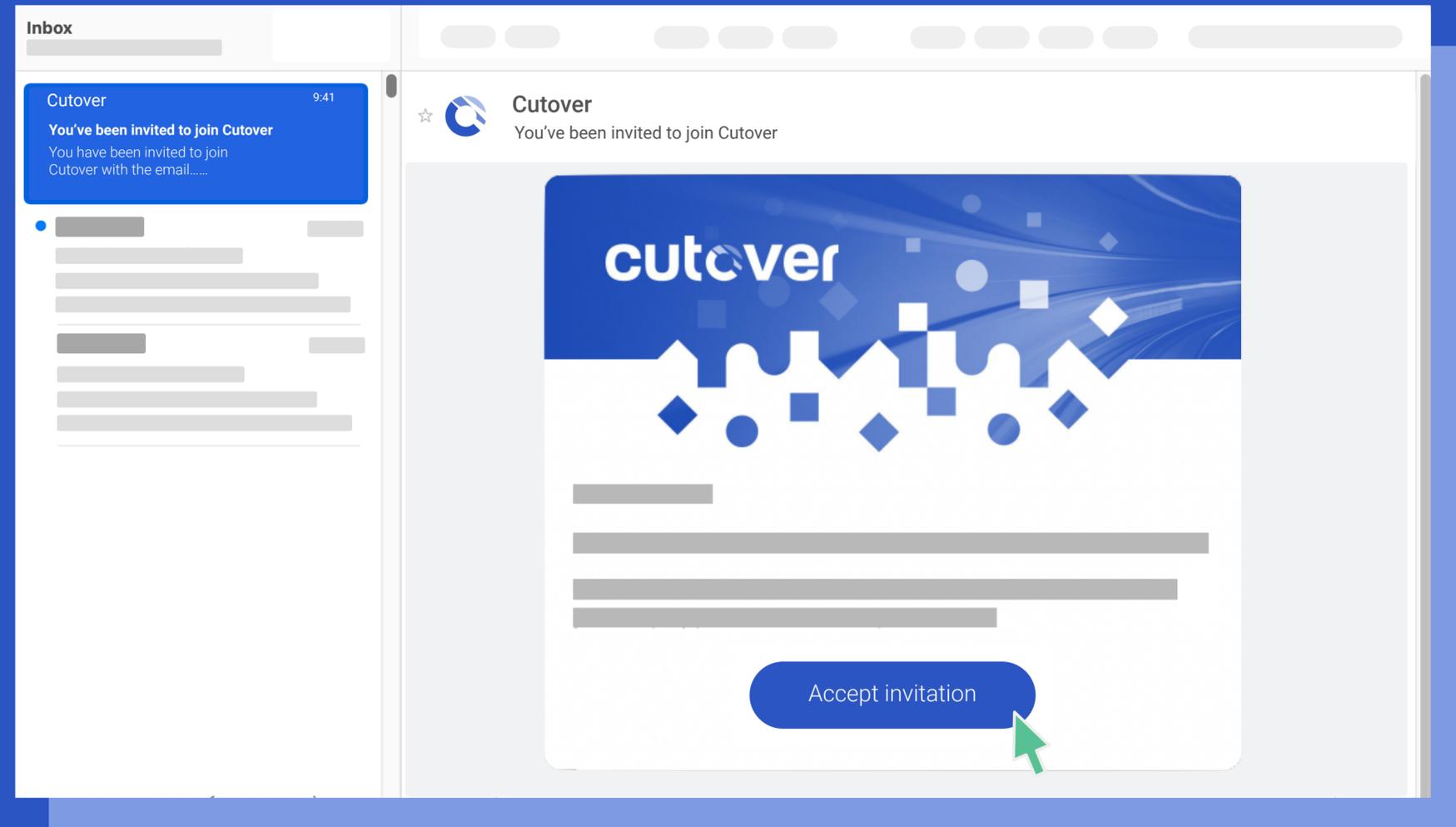
After you have completed the registration, the next time you access Cutover, the login screen will appear enabling you to log in with your email address and chosen password.

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.

*Role Based Access Control (RBAC) is available if you have SSO. Please see more details in our [RBAC article](#)



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 a dashboard with a navigation bar on the left, a 'Home' header, and a 'Workspaces' section. The 'Workspaces' section lists three workspaces with their respective user counts and runbook counts. Below this is a 'Live Runbooks' section with a progress indicator, and an 'Active Tasks' section with a 'STARTABLE' button. Numbered callouts 1-4 point to the navigation bar, the 'Workspaces' section, the 'Live Runbooks' progress indicator, and the 'Active Tasks' section respectively.

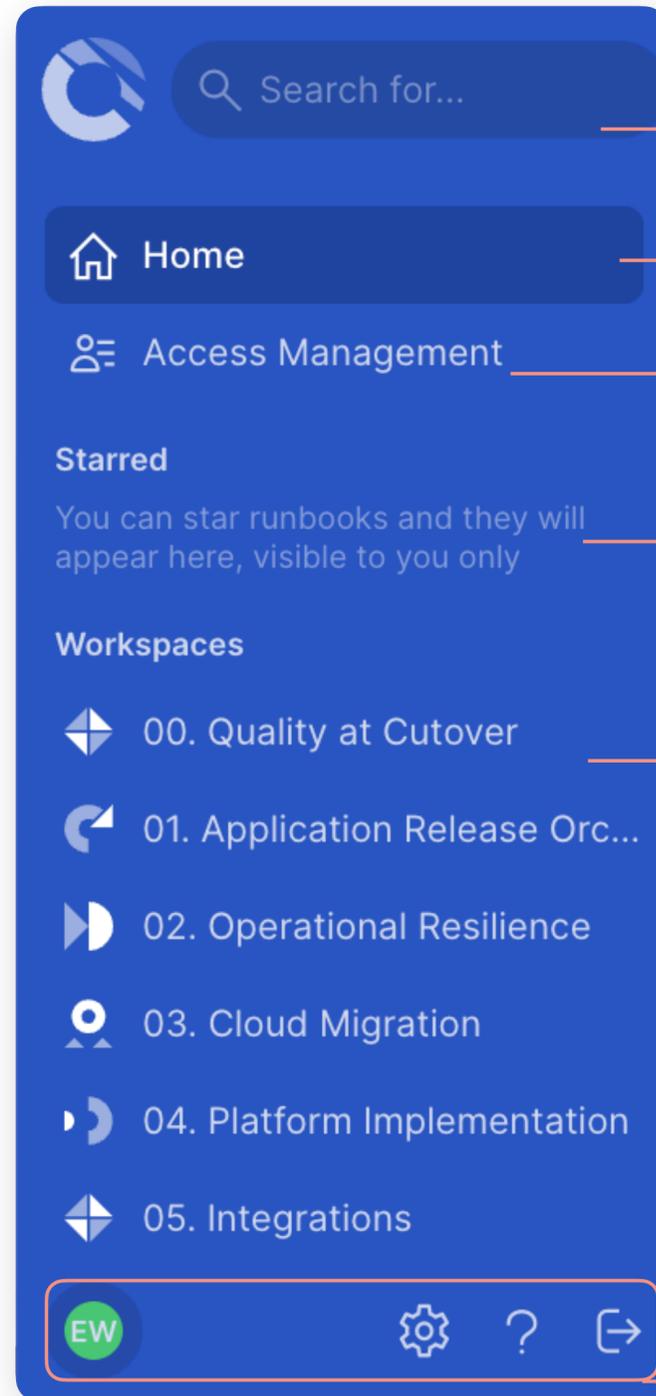
1 Navigation bar see next page for further information.

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.

Navigation Bar



Global Search Bar allows you to search for 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.

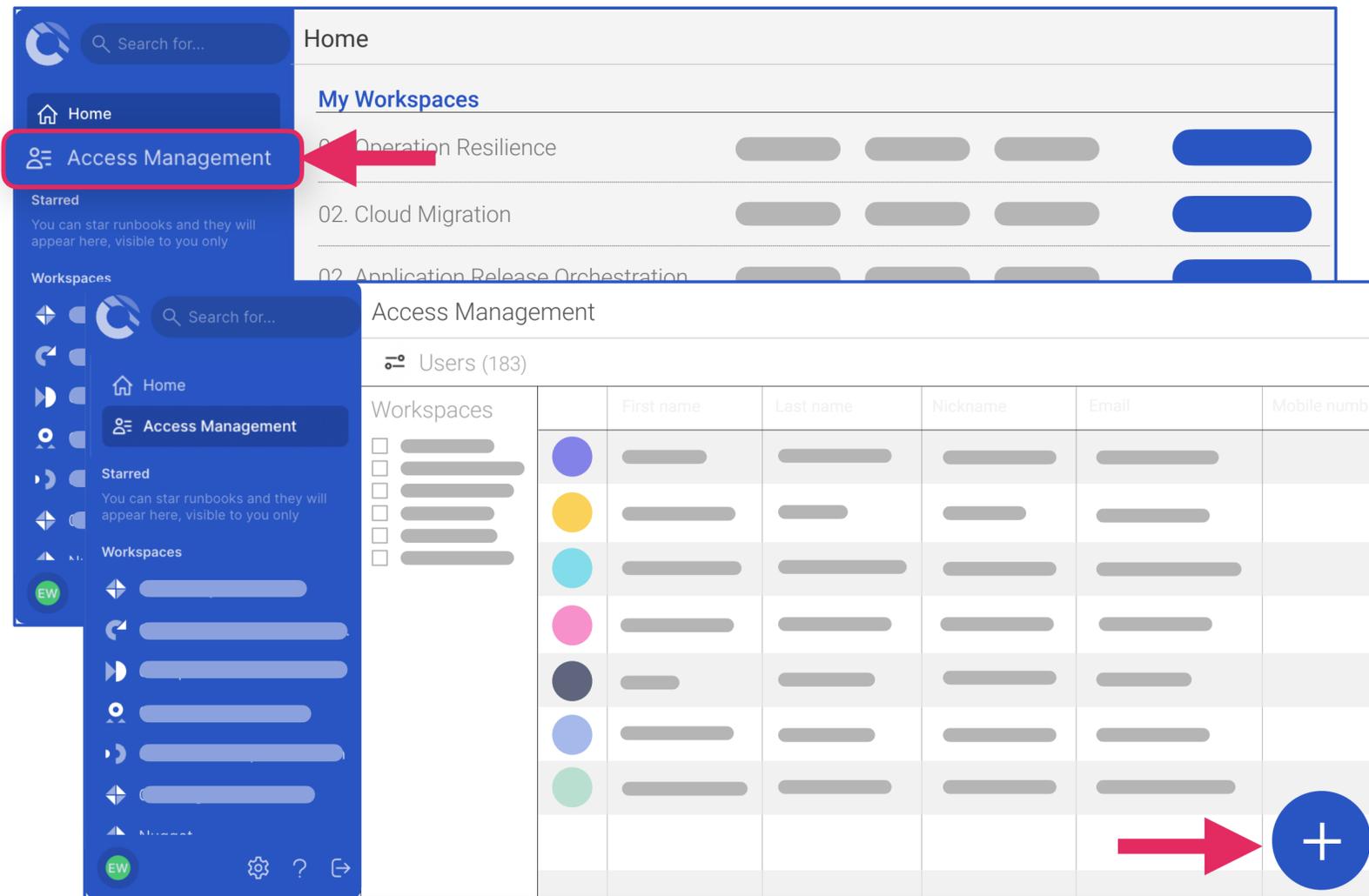
 Log out button

** 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.

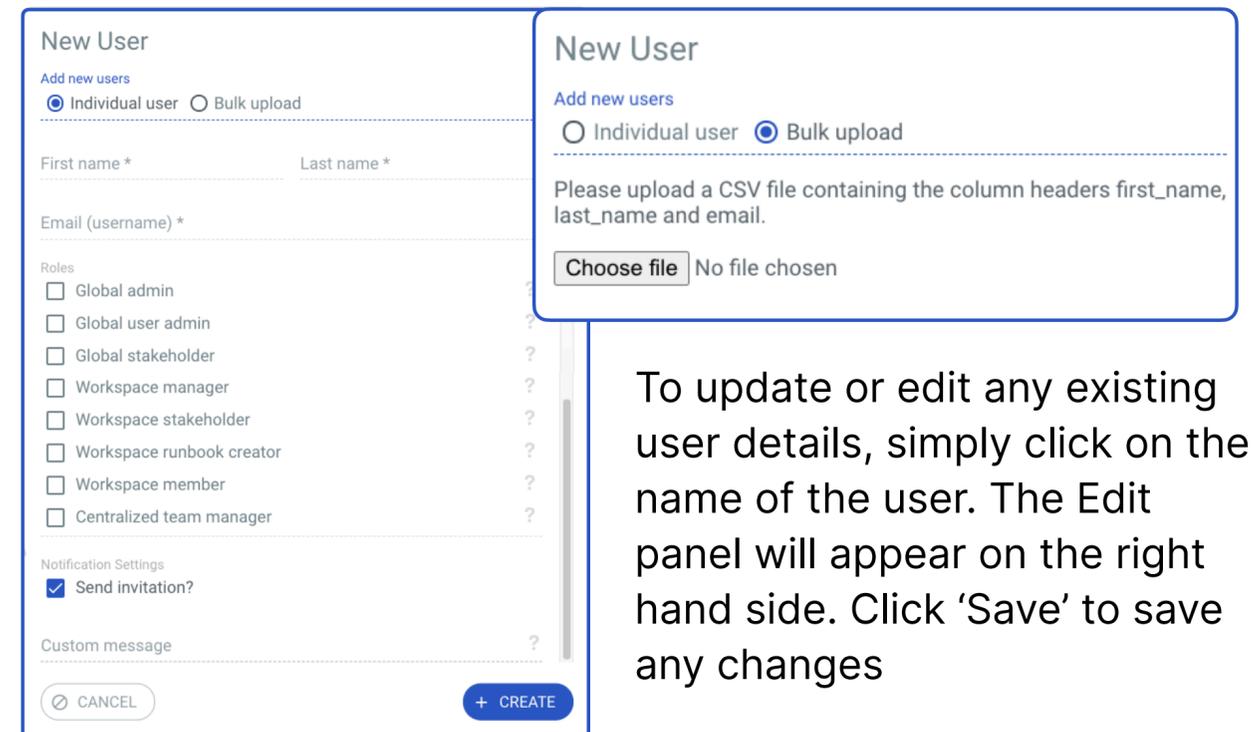


02 Once the + is selected, a pop up will present two options:

- **individual users** to manually add a name and email
- **bulk upload** via CSV. (Upload a CSV file containing the column headers first_name, last_name and email.)

first_name	last_name	email

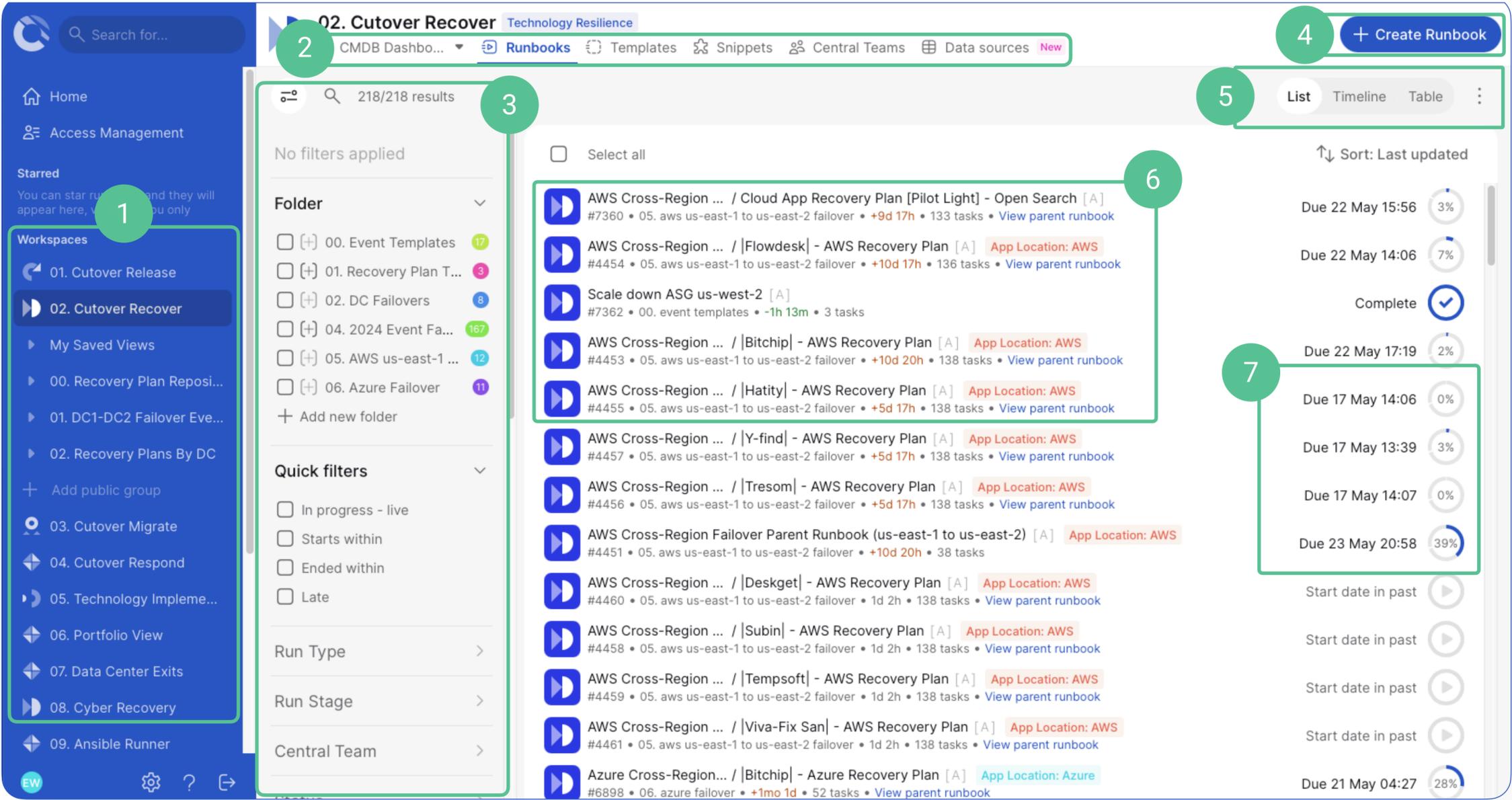
Next you will need to assign user roles and workspace permissions. There is also a check box option to send an invitation via email with an optional custom message attached.



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
Templates
Snippets
Central Teams
Data sources view
- 3. Filters, Folder and Search :**
Sticky Filters
Applied Filters
Folders & other filter options
- 4. Create Runbook**
- 5. Runbook Views & 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 ▼



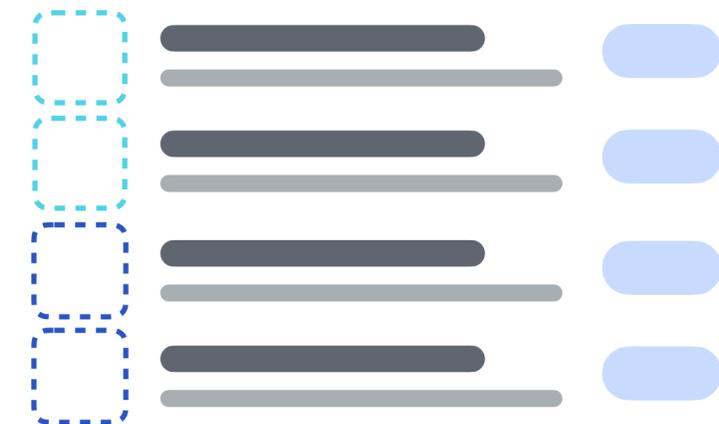
The Workspace Dashboards section (Multi-Runbook Dashboard) provides a real time status of all your runbooks in one view. It is visible to all users who have access to the Workspace. Please also see the [Multi Runbook Dashboard](#) page for more information.

Runbooks



Runbooks will display a list of runbooks 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.

Templates



Templates section will display a list of templates you have access to and allows runbooks creation directly from the template. The filters and folders are also available for templates. Status (Approved, Rejected & Draft) and quick template filters are available for easy access.

Workspace 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.

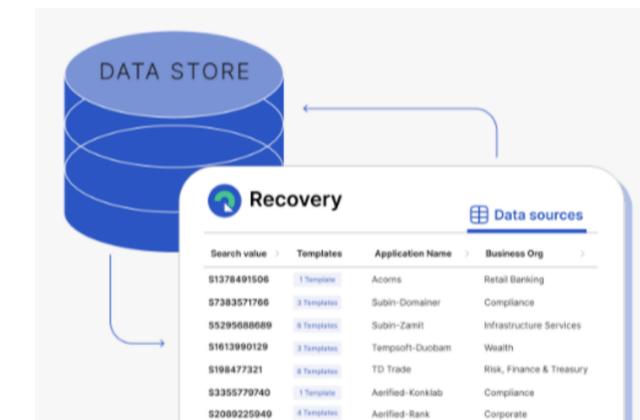
Central Teams

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

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

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

Data sources



The Cutover [data sources view](#) offers a real-time overview of your recovery, migration, or release plans. By utilising your CMDB data, it identifies applications and services linked to associated Cutover templates whilst providing detailed application insights.

Central Teams (for Workspace manager and Centralized team manager)

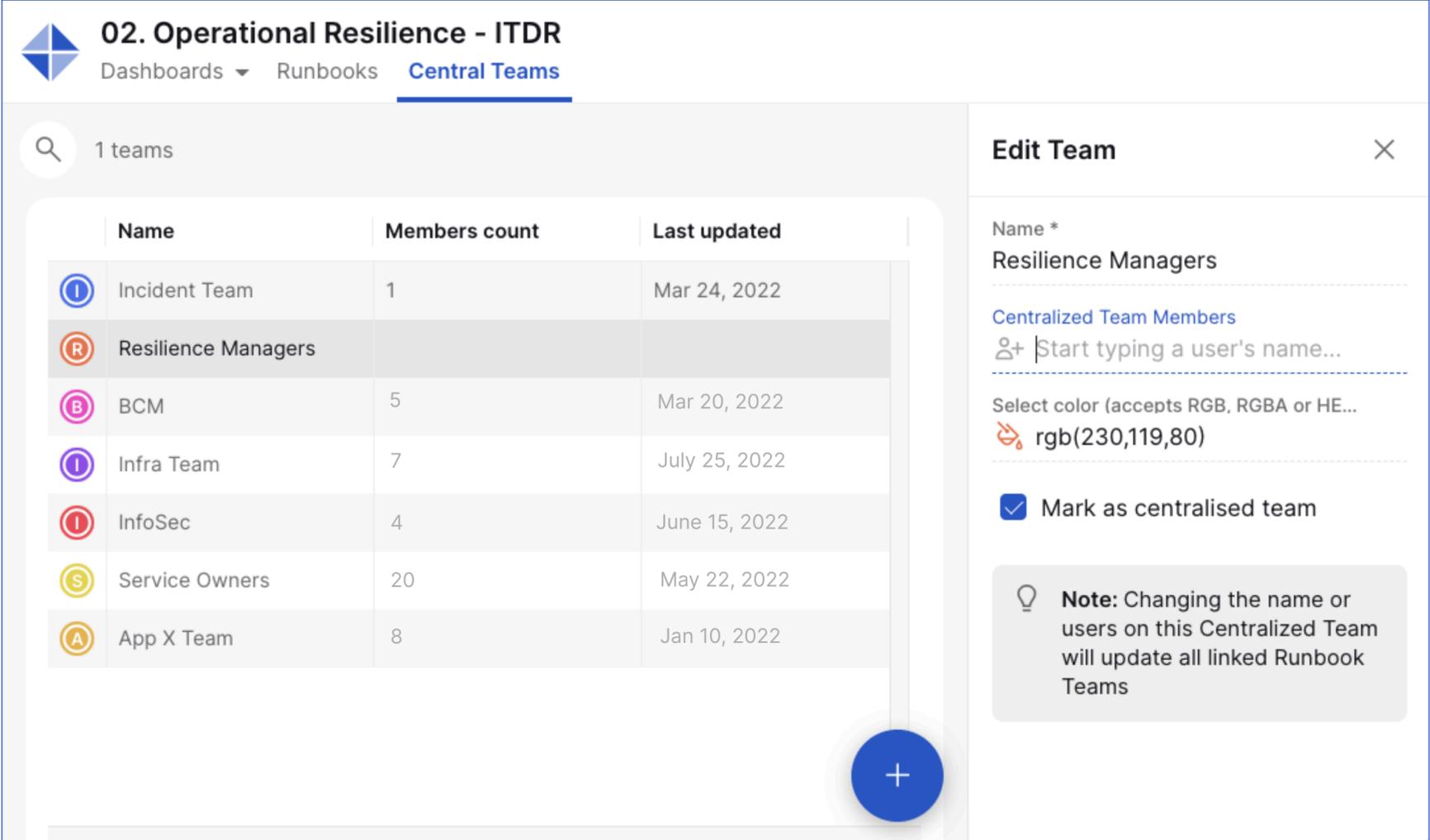
Centralised teams are managed and created at a Workspace level by users with **Workspace manager** and **Centralized team manager** permissions.

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.

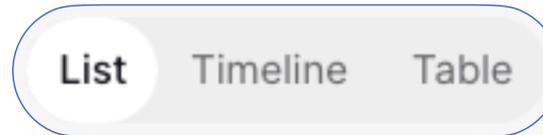


The screenshot shows the '02. Operational Resilience - ITDR' interface. The top navigation bar includes 'Dashboards', 'Runbooks', and 'Central Teams'. A search bar shows '1 teams'. Below is a table of teams:

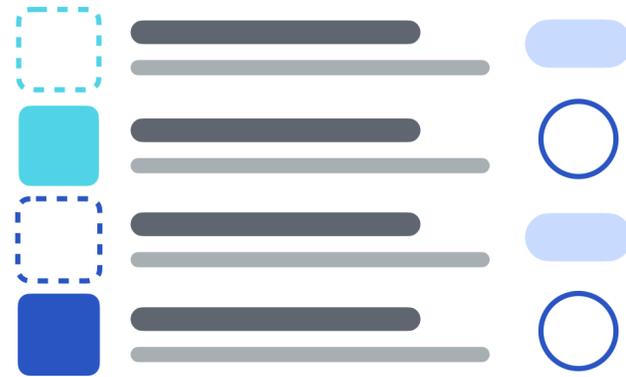
	Name	Members count	Last updated
	Incident Team	1	Mar 24, 2022
	Resilience Managers		
	BCM	5	Mar 20, 2022
	Infra Team	7	July 25, 2022
	InfoSec	4	June 15, 2022
	Service Owners	20	May 22, 2022
	App X Team	8	Jan 10, 2022

The 'Edit Team' modal for 'Resilience Managers' is open on the right. It shows the team name, a search for centralized team members, a color selection field (set to rgb(230,119,80)), and a checked checkbox for 'Mark as centralised team'. A note at the bottom states: 'Note: Changing the name or users on this Centralized Team will update all linked Runbook Teams'.

Workspace Views

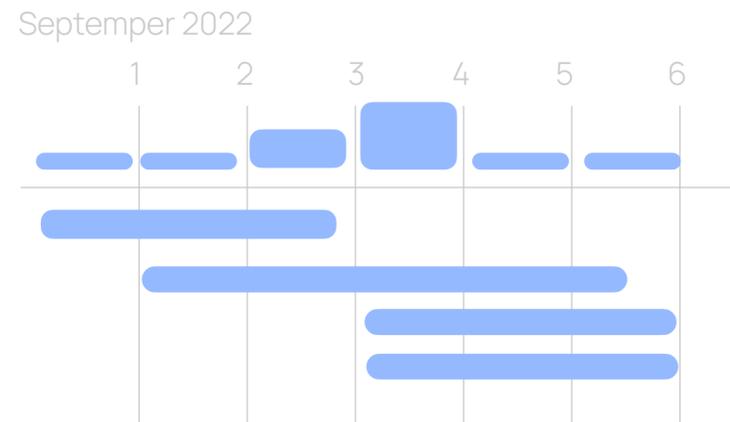


List



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 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. *Timeline is not available for templates.

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

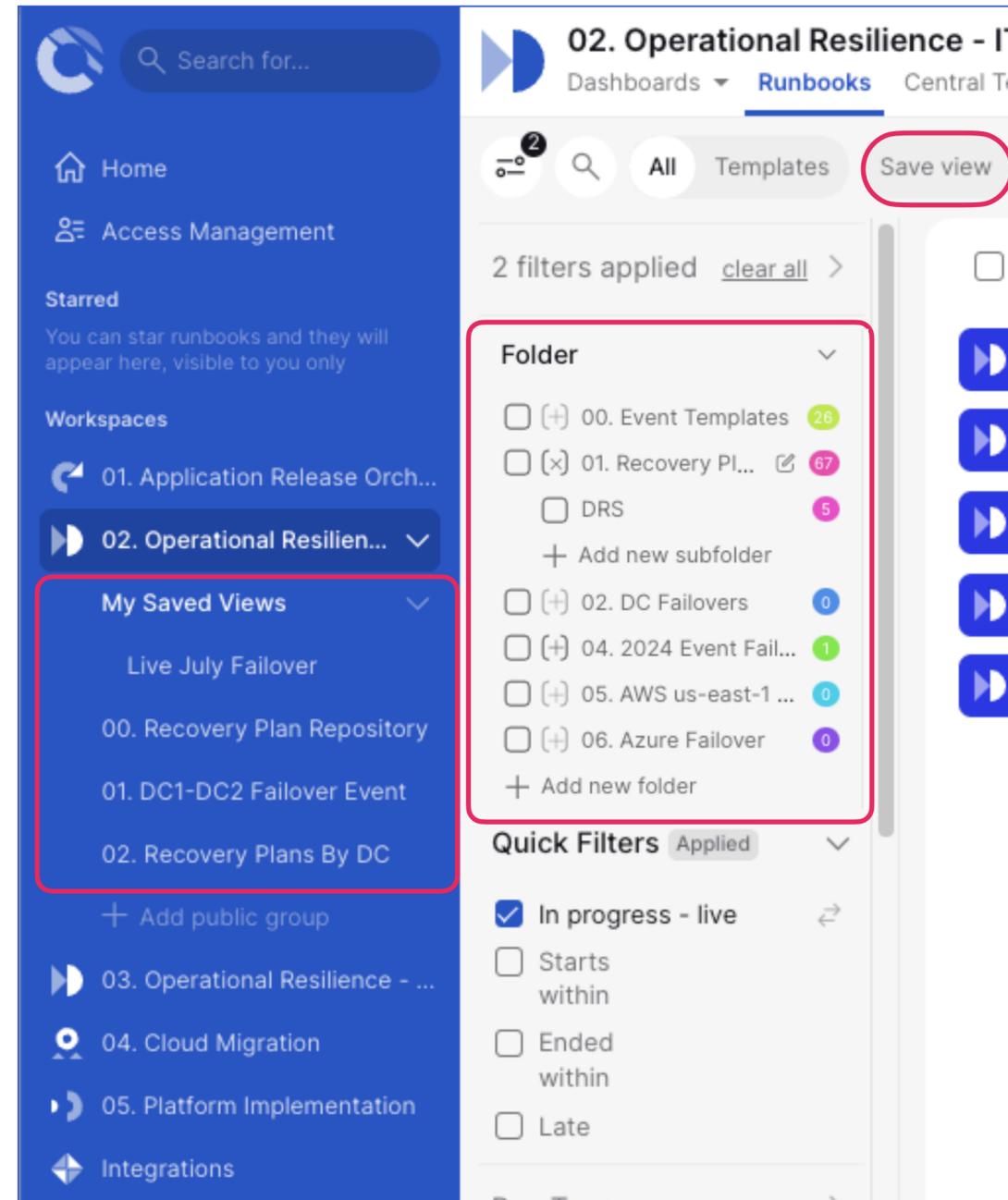
Locate a specific runbook or runbooks using filters. In your workspace view, click the filter icon. Filter results by folder, run type, runbook type, and more.

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 & Subfolders

Workspace managers 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.

Click the [+] to create a **Subfolder** and “+ Add new subfolder” to create additional subfolders.



Runbook Overview

The screenshot shows the 'Bytecard - Recovery Plan [DC1 Failover] V2' runbook interface. It is currently in 'Live Run (dynamic)' mode. The interface includes a navigation bar at the top with 'Pages', 'Dashboards', 'Tasks', and 'Audit log'. A search bar and 'My tasks' section are on the left. The main area displays a task list with details such as task ID, name, time, and status. A 'Continue to next page' button is visible over the task list. Callouts 1-5 highlight: 1. Runbook name and details; 2. Stream and runbook filters; 3. Task views; 4. Runbook duration & Runbook State; 5. Runbook admin actions.

1. Runbook name and details:

- Runbook settings (duplicate, merge, task import from CSV...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 & Runbook State

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.

- Icon allows runbook admin start, pause and cancel for live and rehearsal runbooks.
- A blank icon will show for non-runbook admin members

5. From top to bottom:

Runbook details:

- Icon displayed for runbook admin
- For Runbook members (view only)

Runbook teams

Comments

Adhoc comms (only visible for Runbook Admin)

***Cutover AI**

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



Runbook & Task Overview

The screenshot displays a task list for a failover process. The tasks are as follows:

- #1 |Bytecard| T0 START - Start Prep for Failover (Starts 16 Apr 14:00)
- #2 |Bytecard| Inform stakeholders application failover has started
- #3 |Bytecard| Check DB Connections (Starts 14:12)
- #4 |Bytecard| Check DR Database (Starts 14:39)
- #5 |Bytecard| Regional Recovery Certify (Starts 21 May 17:10)
- #6 |Bytecard| Confirm Application ready for shutdown (Starts 16 Apr 14:42, T0 - Prep For Failover • Started 22m 8s late)
- #7 |Bytecard| Shutdown Application Services
- #8 |Bytecard| Shutdown Application UI (Starts 14:43)
- #9 |Bytecard| T0 COMPLETE - Prep for Failover Complete (Starts 14:44)
- #10 |Bytecard| T1 START - Start Infra Failover
- #11 |Bytecard| Isolate Networks

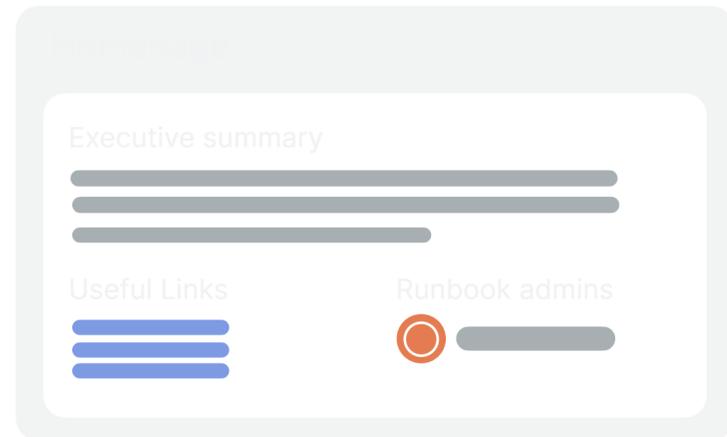
1. **Task start date and time**
2. **Task icon:**
Icon shape = Task type
Icon colour = Assigned streams
3. **Task ID and title** (click on task name to view tasks details)
4. **More options** (task export, highlight mode)
5. **Task duration**
6. **Task Options:** Only visible if when hover over the task. It includes (from left to right)
Add task comments
Skip task
More task option: Allows you perform additional actions such as, Delete, duplicate, add linked tasks, add snippets....and more
7. **Assigned teams and users**
8. **Critical path (automated)**

* 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.

Audit log

Date	Change summary
7 Nov 2024 10:28	Runbook updated
7 Nov 2024 10:24	Runbook updated
11 Jul 2024 11:42	Runbook updated
28 Jun 2024 14:50	Runbook updated
1 Apr 2024 20:55	Runbook updated
19 Jun 2023 15:45	Task #T13 [Bytecard] T1 COMPLETE - Infra Failover Complete rea
19 Jun 2023 15:45	Task Integration update: Build status (#T12 [Bytecard] DNS Push)
19 Jun 2023 15:45	Task Integration update: Build status (#T12 [Bytecard] DNS Push)
19 Jun 2023 15:45	Task Integration update: Build status (#T12 [Bytecard] DNS Push)
19 Jun 2023 15:45	Task #T12 [Bytecard] DNS Push started

The Audit Log displays all actions and timings related to a runbook including amendments to a runbook's details, streams, teams, and changes to individual tasks.

All actions are now displayed in a single list. Use the filters or More Options (three dots) option to download the data as a CSV file or refresh.

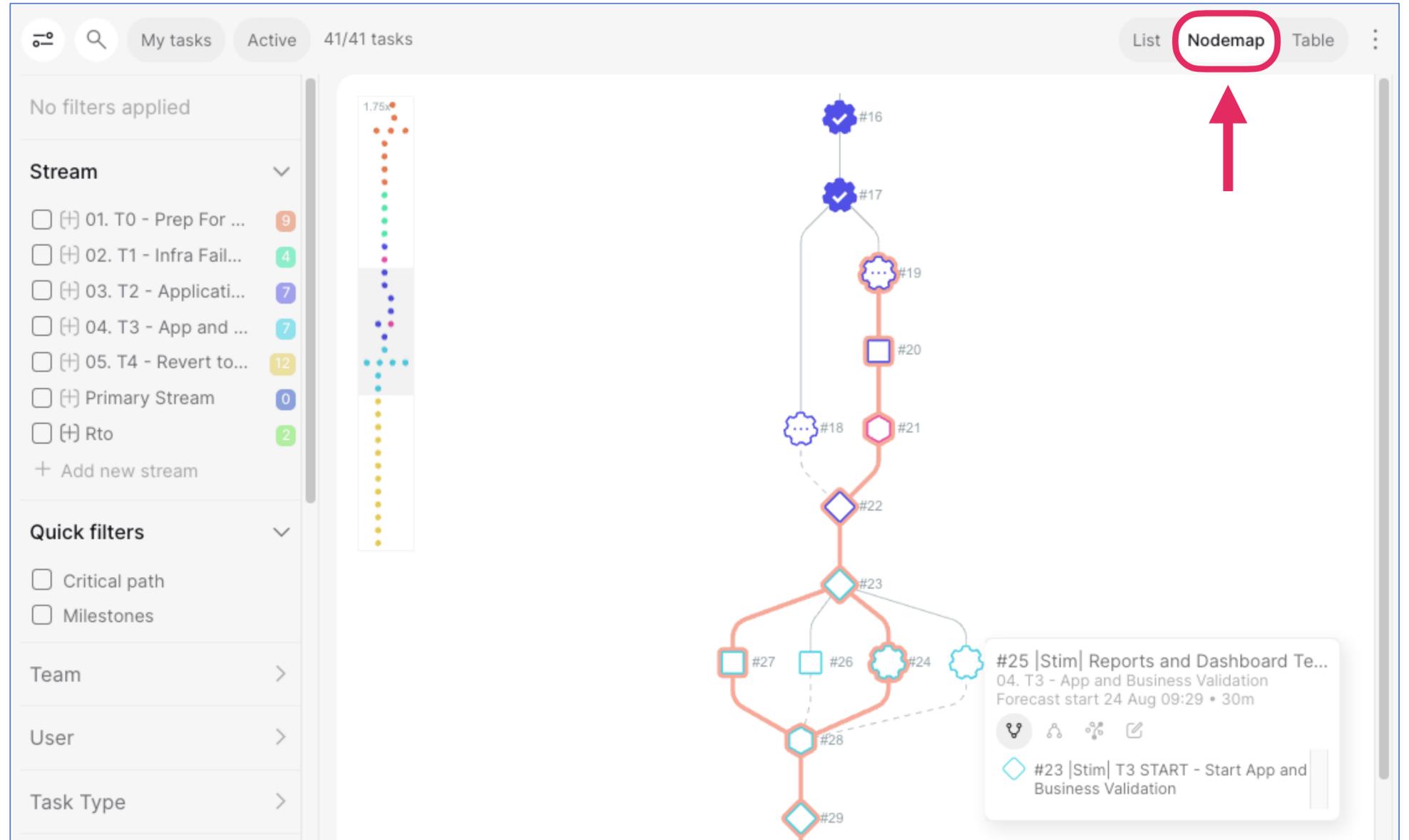
Nodemap

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 a 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", and "Tasks". A search bar shows "My tasks" with "41/41 tasks" results. On the left, a "Stream" list includes tasks like "01. T0 - Prep For Fail...", "02. T1 - Infra Failover", etc., each with a checkbox and a colored indicator. Below the stream is a "Quick filters" section with options like "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)". A red box highlights the "Users and Teams" panel and a user icon. A blue callout box explains that streams are a logical way of grouping tasks and can be filtered by selecting a checkbox next to the stream name, and that a task's color corresponds to the stream it is assigned to. Another blue callout box explains that filters allow users to see relevant tasks, including those assigned to them, their team, or those that are late. A third blue callout box explains that Runbook teams are created by Runbook Admin, and team members can be selected to see team members. It also notes that teams or individual users within a team can be assigned to tasks, and multiple teams and users can be assigned to a single task.

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.

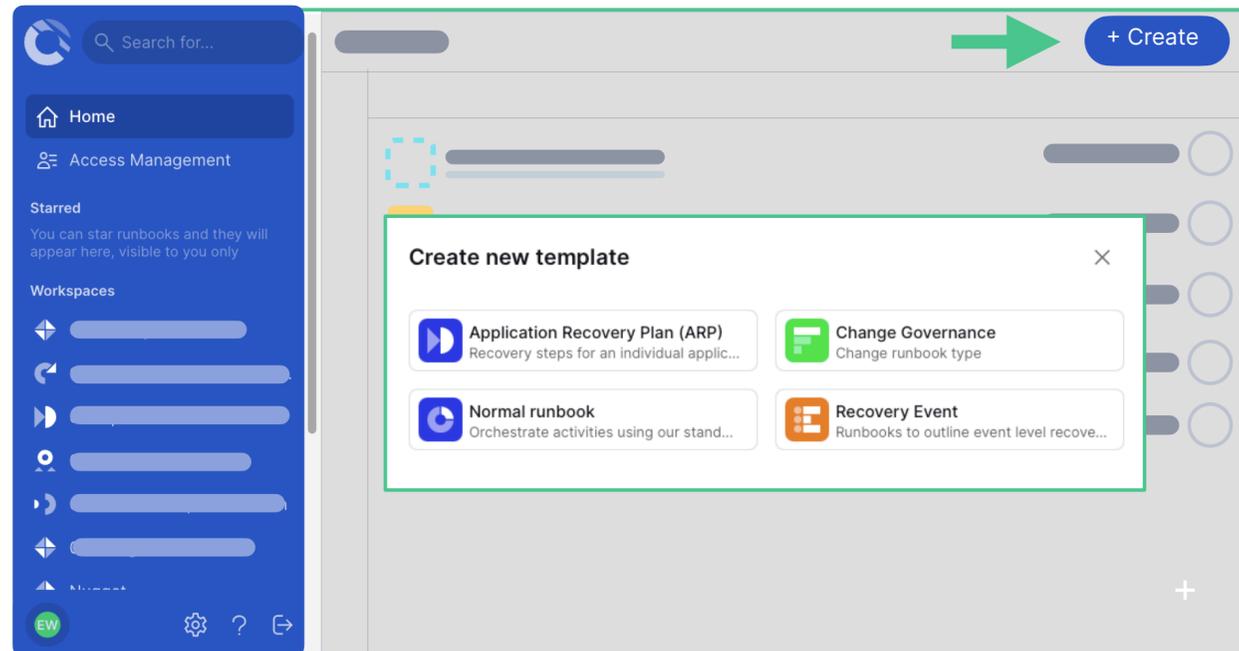
Runbook teams are created by Runbook Admin. You can select each team to see the team members. Teams or individual users within a team can be assign to tasks. Multiple teams and users can be assigned to a single tasks.

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

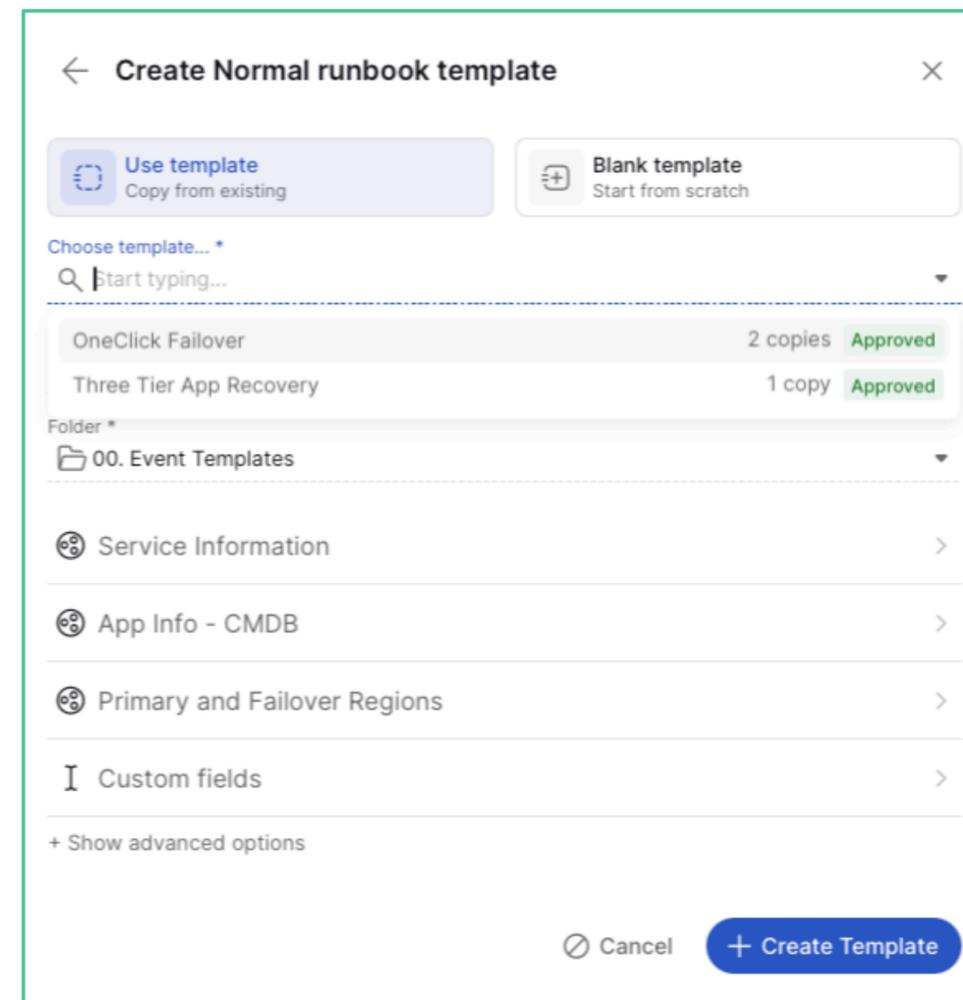


Create Template (for Runbook Creator)

01 To create a template, navigate to a workspace, the the Template section and click the **+ Create Templates** icon at the top right of the screen
A pop up modal will appear for you to select a runbook type.



02 Once a runbook type is selected there is the option to create a template from existing, or start from blank.
Fill in all necessary details like folders or custom fields information then finish by clicking “+ Create Template”.

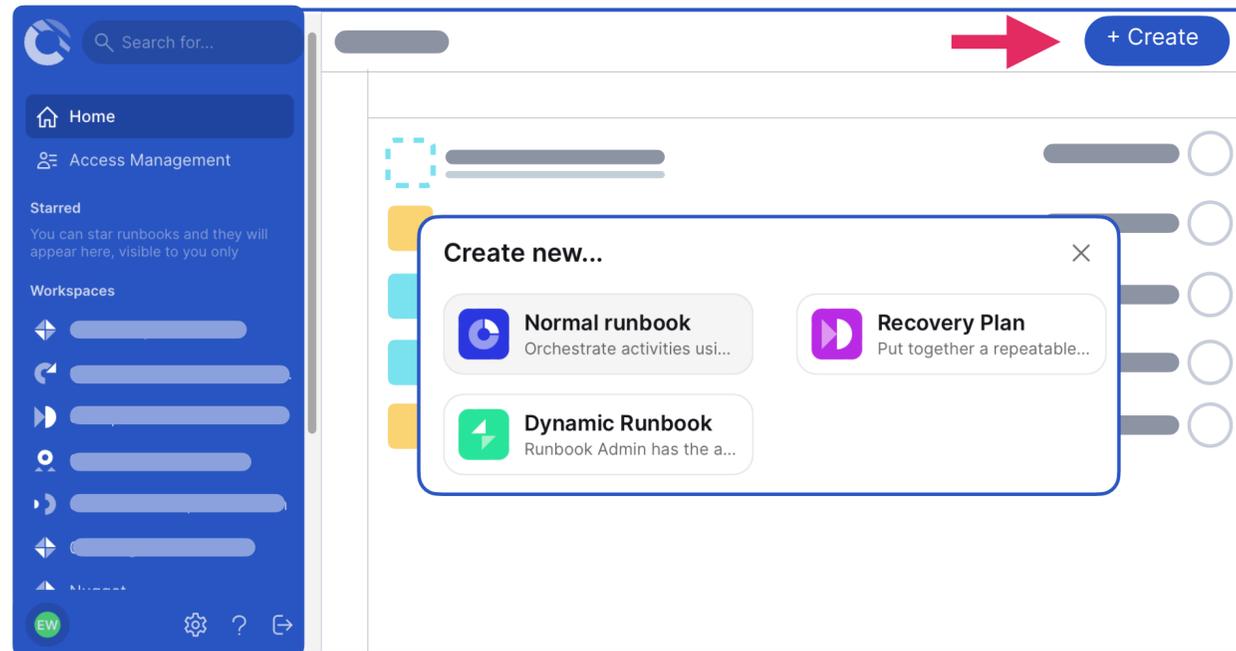


**Please note, if you do not see the “+” icon but need to create templates, then contact your administrator to request additional permissions*

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

A pop up modal will appear for you to select a runbook type.

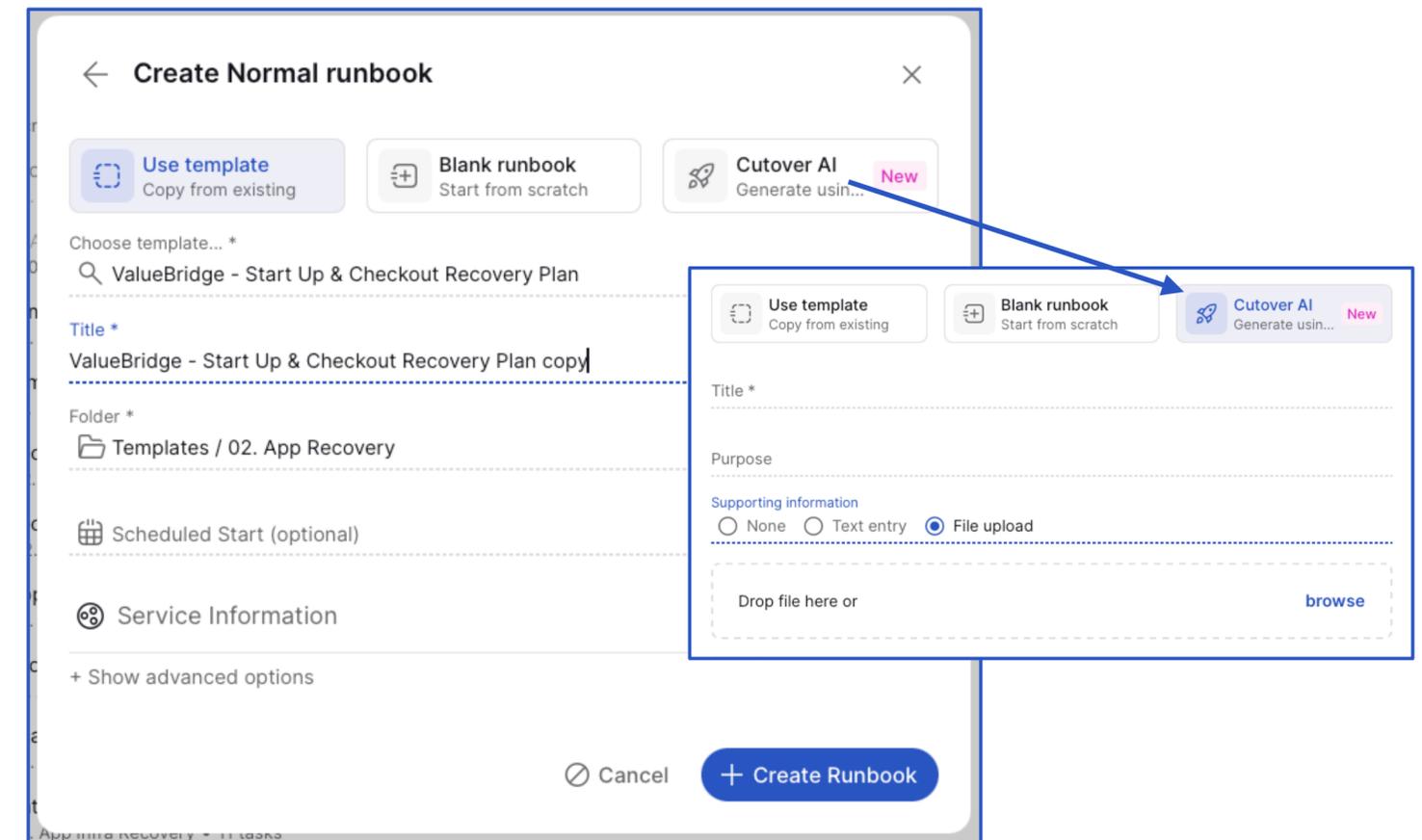


**Please note, if you do not see the “+” icon but need to create runbooks, then contact your administrator to request additional permissions*

02 Select a runbook type. Then, optionally select a template or start from blank.

Choose a default start time, date and any other information. Once finished, your runbook will be created.

**[Cutover AI](#) feature is available using prompts to generate runbooks (additional fee applies)*



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.

[+ Create task](#) [Add tasks without predecessors](#)

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

Edit a task



To edit existing tasks, selecting the task title will automatically open 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?

[Description](#)

[Assigned Users & Tea...](#)

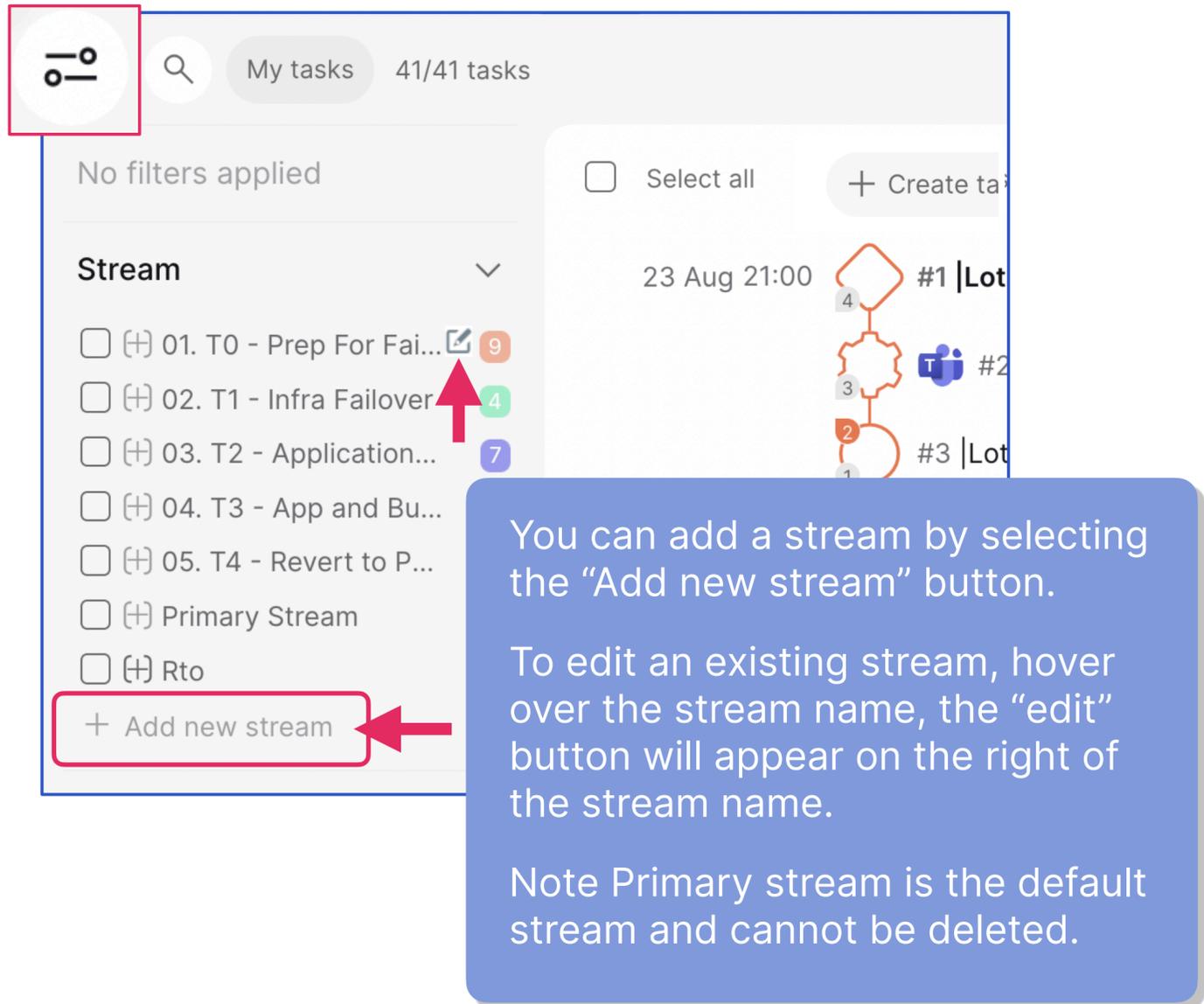
[Dependencies](#)

** 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 + Create task

23 Aug 21:00 #1 |Lot

Stream

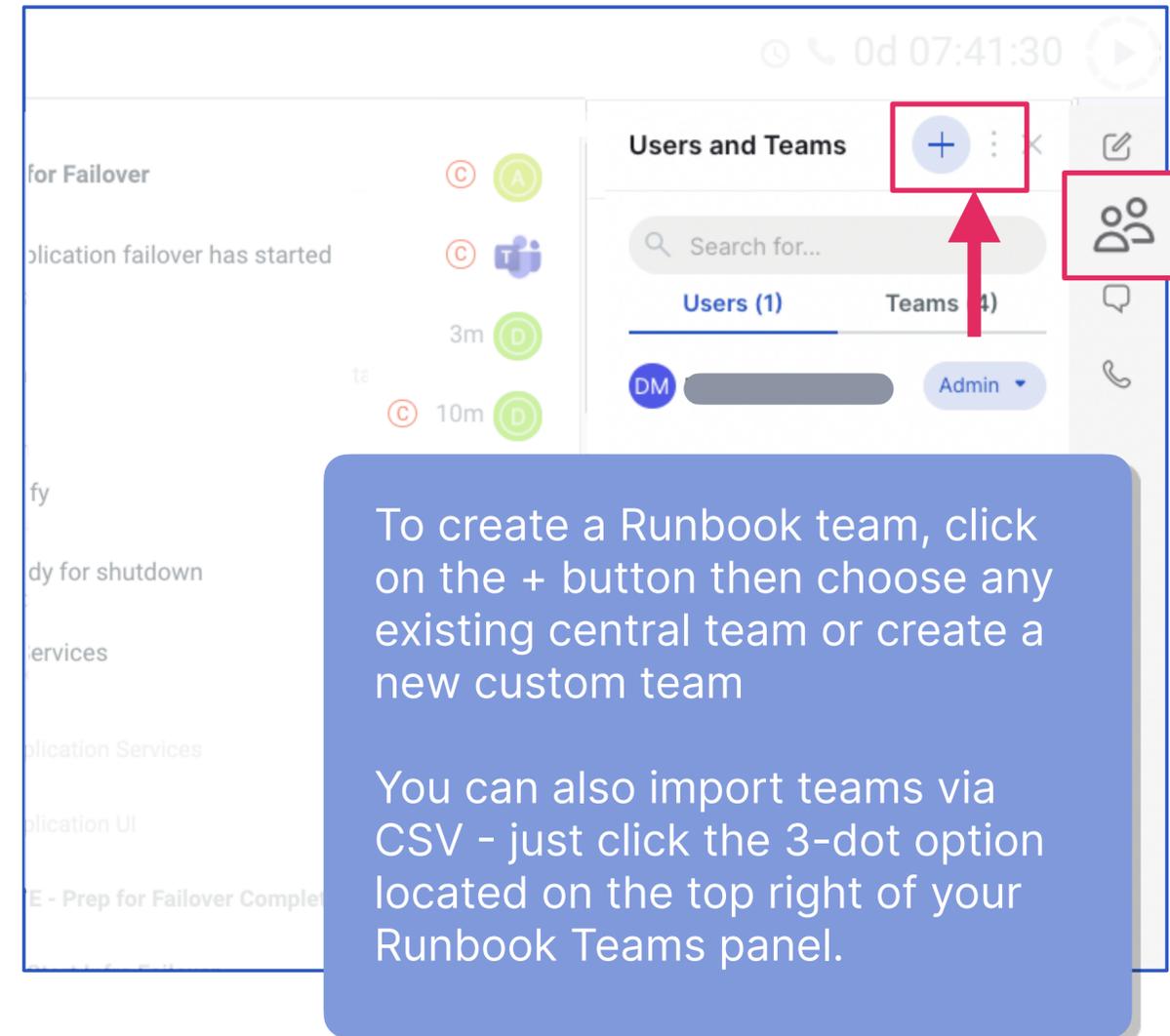
- (+) 01. T0 - Prep For Fai... 9
- (+) 02. T1 - Infra Failover 4
- (+) 03. T2 - Application... 7
- (+) 04. T3 - App and Bu...
- (+) 05. T4 - Revert to P...
- (+) Primary Stream
- (+) Rto
- + Add new stream

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...

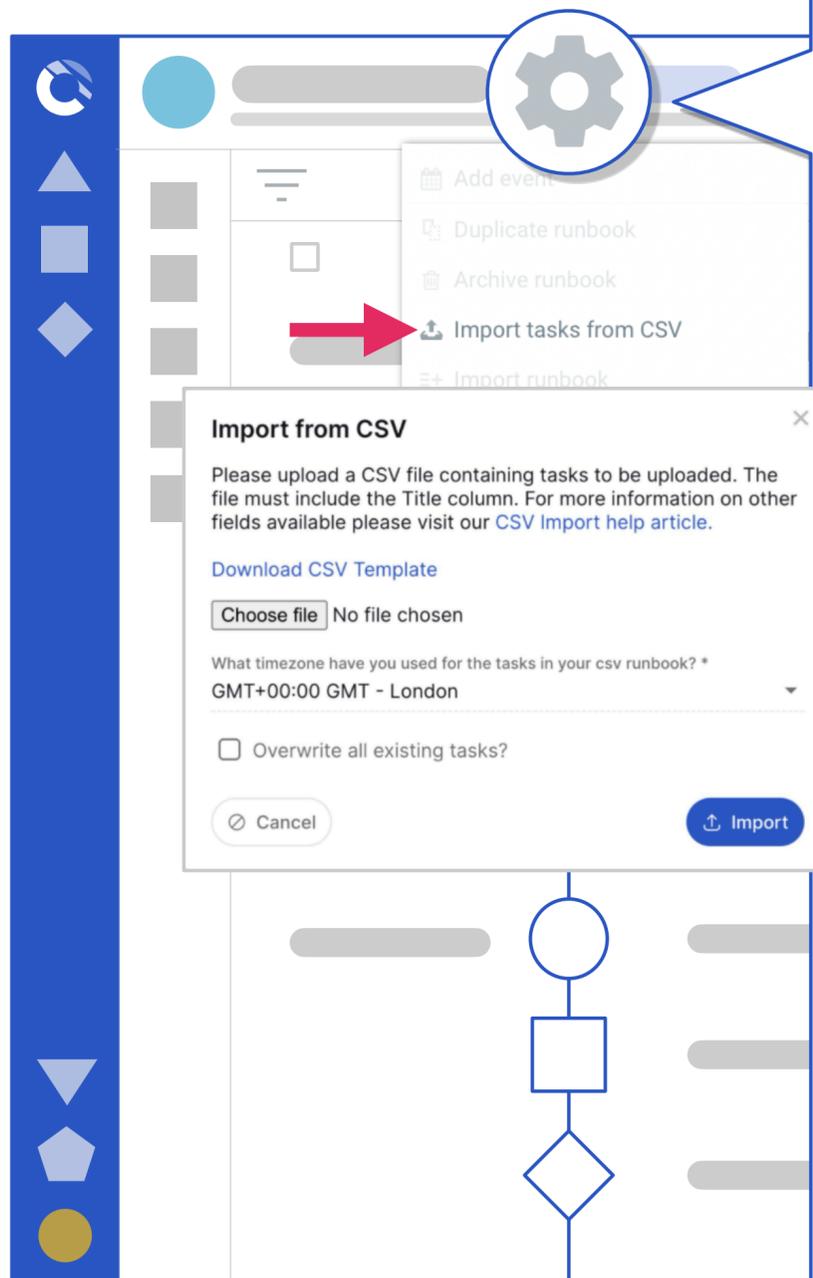
Users (1) Teams (4)

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.

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.

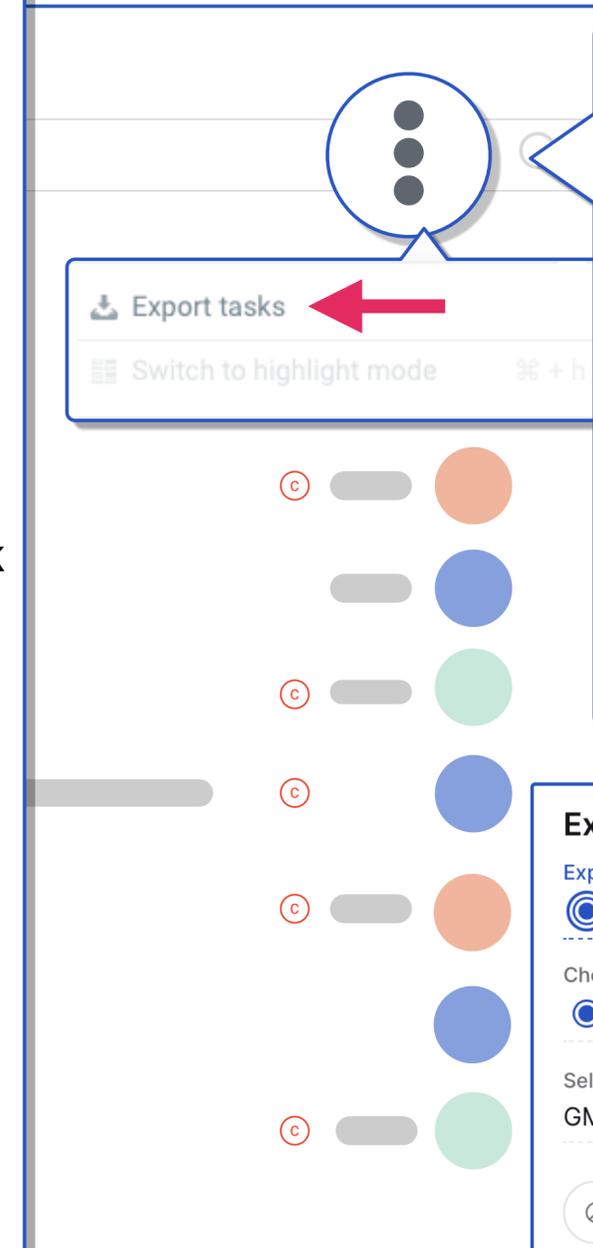
Before you can import tasks, you will need to either:

- **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.

The file must include the **Title column**. For more information on other fields available please visit our [CSV Import help article](#).

You can download a CSV upload template within the pop-up modal.



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

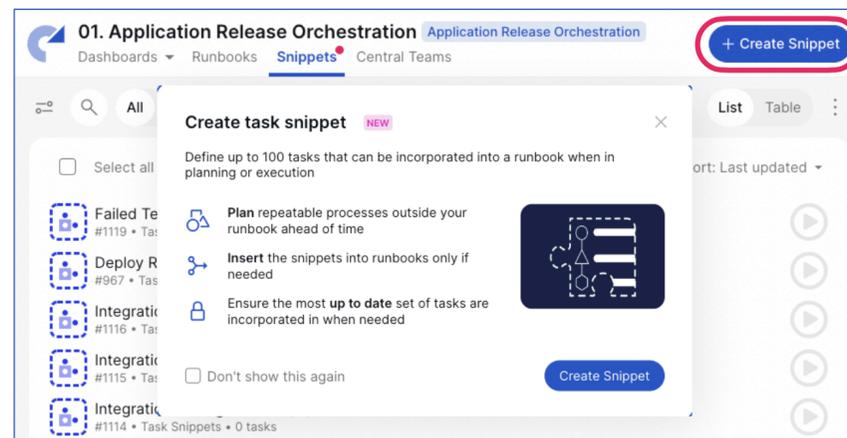
The pop up will ask you to select the following:

- 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

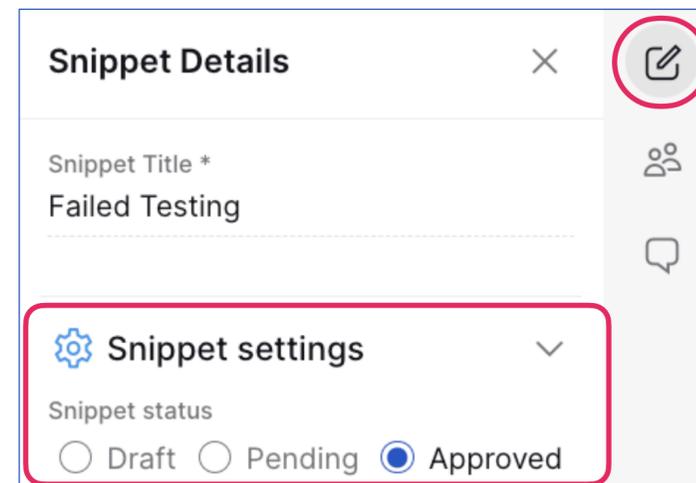


To create a snippet, click the Snippets tab in your workspace. Next, click the **+ Create Snippet** button on the upper right-hand corner of the screen.

You have the ability to add up to 100 tasks.

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

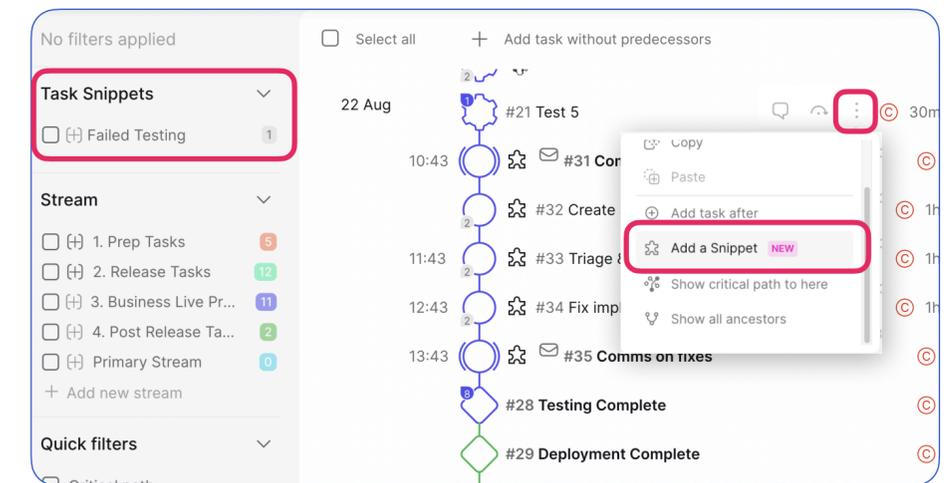
Approve Snippets



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.

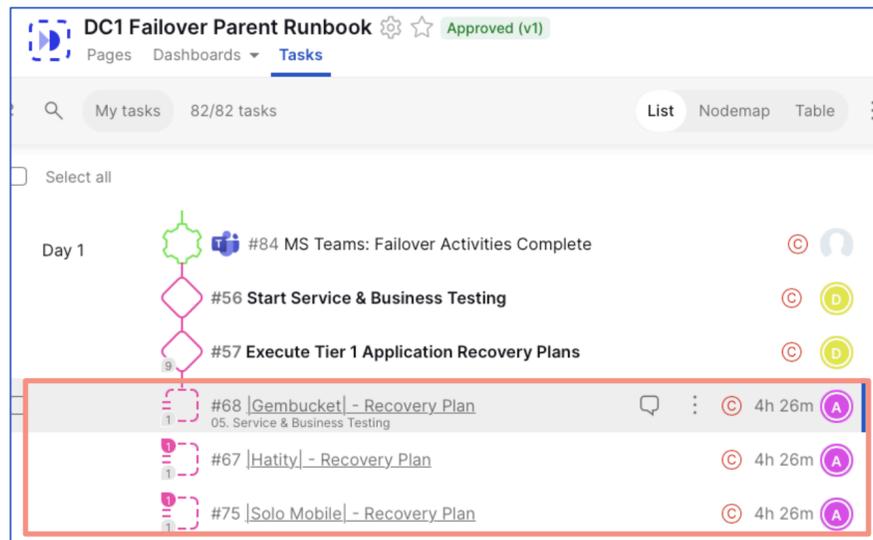
In the pop-up modal, click Add. Afterward, your task snippet will be added to your runbook



Linked Runbooks

Linked runbooks allow you to control a multi-runbook event from a parent runbook with one or more linked child runbooks.

Parent and Child Runbook

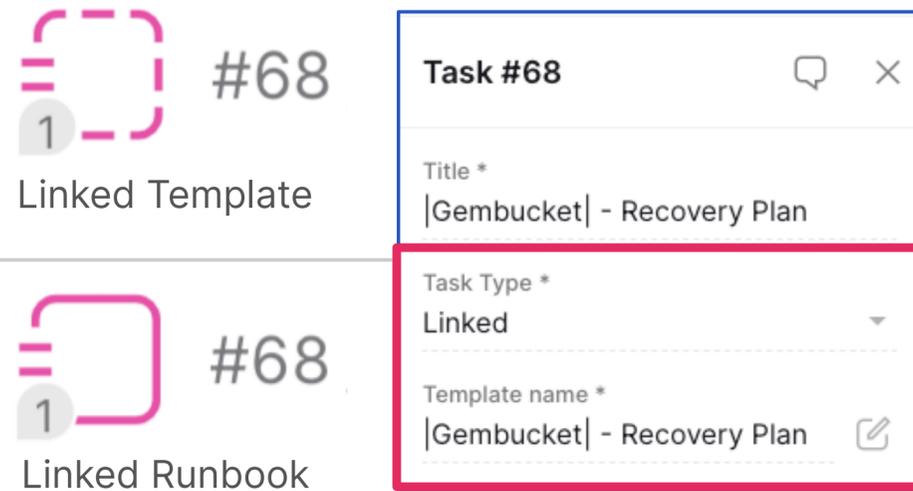


A parent runbook has one or more linked runbooks (child) attached. It has full control over the execution of an event.

Child runbooks cannot be started until its dependency has been met in the parent runbook.

Single level relationship, cannot have inter task dependencies between parent to child runbooks nor link another runbook within the child runbook.

Linked Task Type

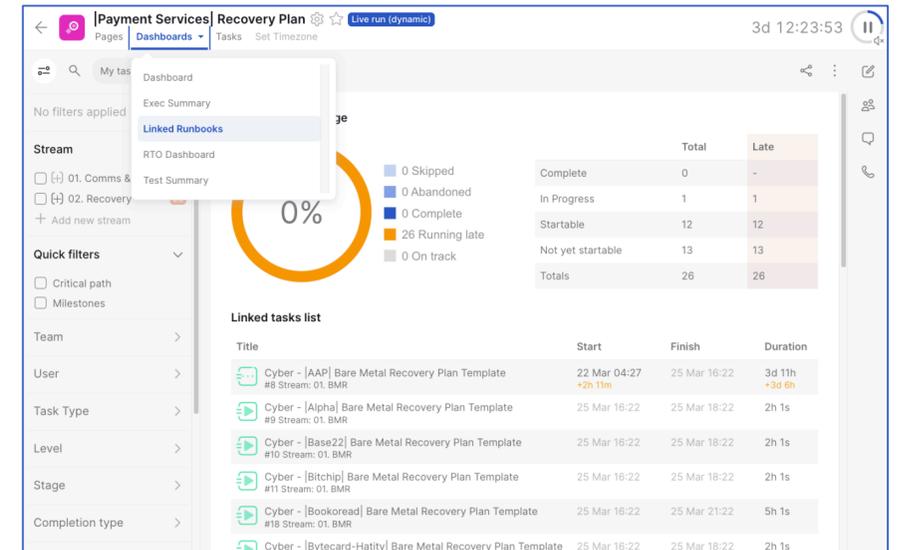


A linked task type allows you to link runbooks to a parent runbook. A linked task is illustrated by two dashes on the rounded square task icon.

Single Linked task can be created by adding a new task and change the task type to "Linked", then select a template.

Adding multiple Linked tasks by clicking the 'More options icon' on the right of the task title you'd like to create linked tasks in bulk from, then 'Insert linked task(s)'.

Linked Tasks in Dashboard

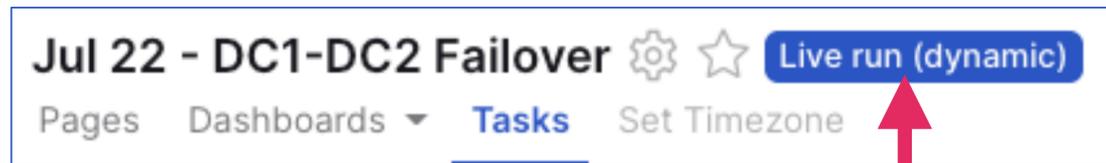


Child runbooks (Linked tasks) have a dedicated dashboard in the 'Dashboard' section of the parent runbook called 'Linked Runbooks'. The Linked Runbooks dashboard provides a real time progress status on all your child runbooks.

Please visit our [Help Centre Articles](#) and [training videos](#) for more detailed information on **Linked Runbooks!**



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

The screenshot shows the 'Lotlux - Recovery Plan [Jul 22] DR Failover' interface. At the top right, a play icon is highlighted with a red box. Below it, a blue callout box contains the text: '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.'

The main interface displays a task list with 41/41 tasks. The tasks are numbered 1 through 8, with the first task being '#1 |Lotlux| TO START - Start Prep for...'. The 'Runbook Start' dialog box is open, showing a progress bar for validation checks (0/5) and options for 'Run Type' (Rehearsal selected, Live unselected) and 'Communication Settings' (Off selected, Test Comms only unselected, On unselected). There is also a checkbox for 'Rebaseline the start of the runbook to the current time?' and buttons for 'Cancel' and 'Start Run'.

Below the dialog box, another blue callout box contains the text: '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.

A Runbook Administrator can override users to start and complete tasks



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.**



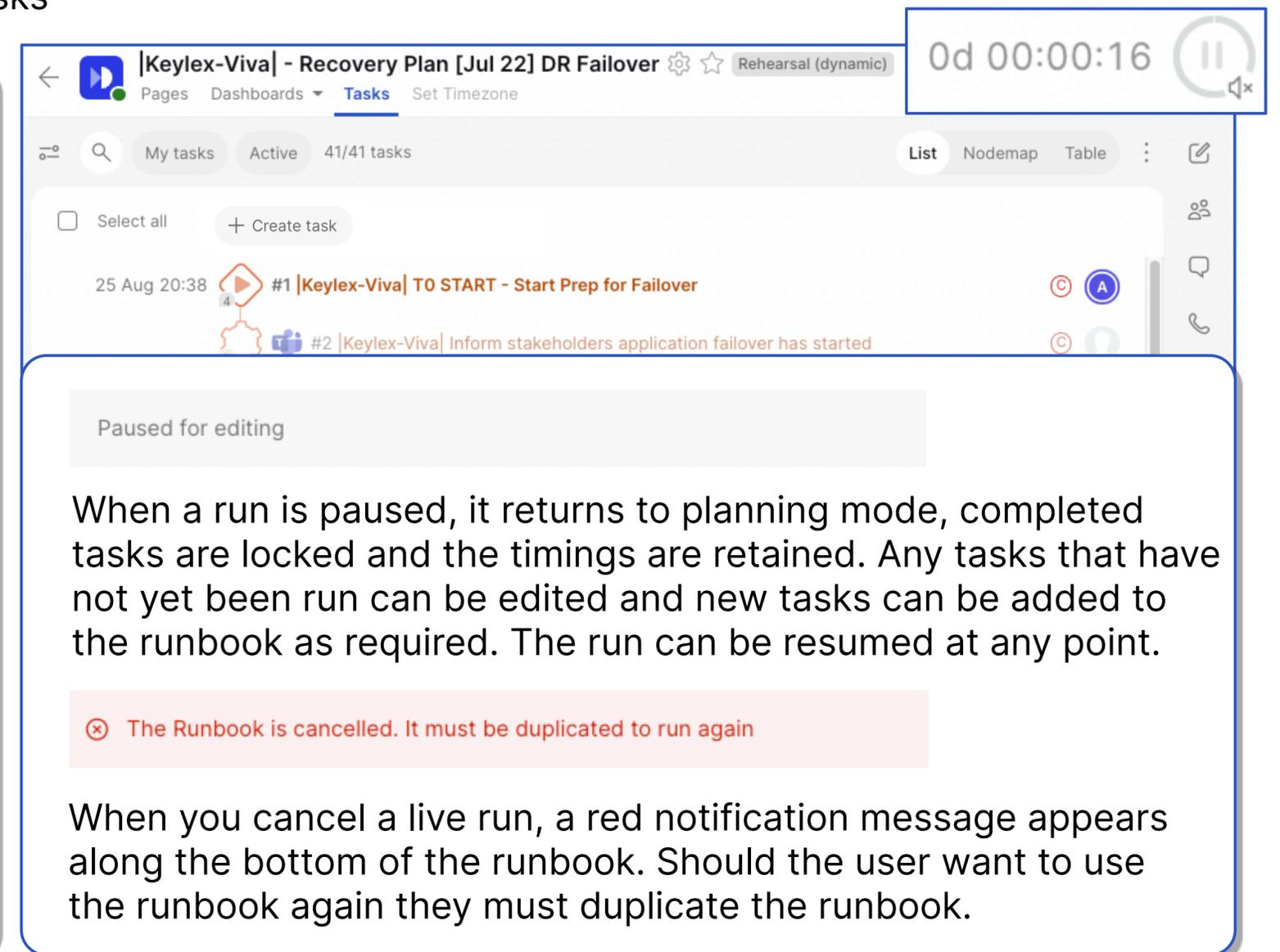
When there is a Started or **in progress task**, the icon changes to a dash. The actual start time is captured and the start times for subsequent tasks is reforecast. **in-progress tasks can be finished by clicking on the icon.**



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.



The screenshot shows the 'Tasks' section of the Keylex-Viva Recovery Plan. The top right corner displays a timer at '0d 00:00:16' and a pause icon. Below the timer, there are tabs for 'My tasks', 'Active', and '41/41 tasks'. A task list is visible with two items: '#1 |Keylex-Viva| TO START - Start Prep for Failover' and '#2 |Keylex-Viva| Inform stakeholders application failover has started'. A notification box at the bottom of the runbook states: 'Paused for editing' and 'The Runbook is cancelled. It must be duplicated to run again'.

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.

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

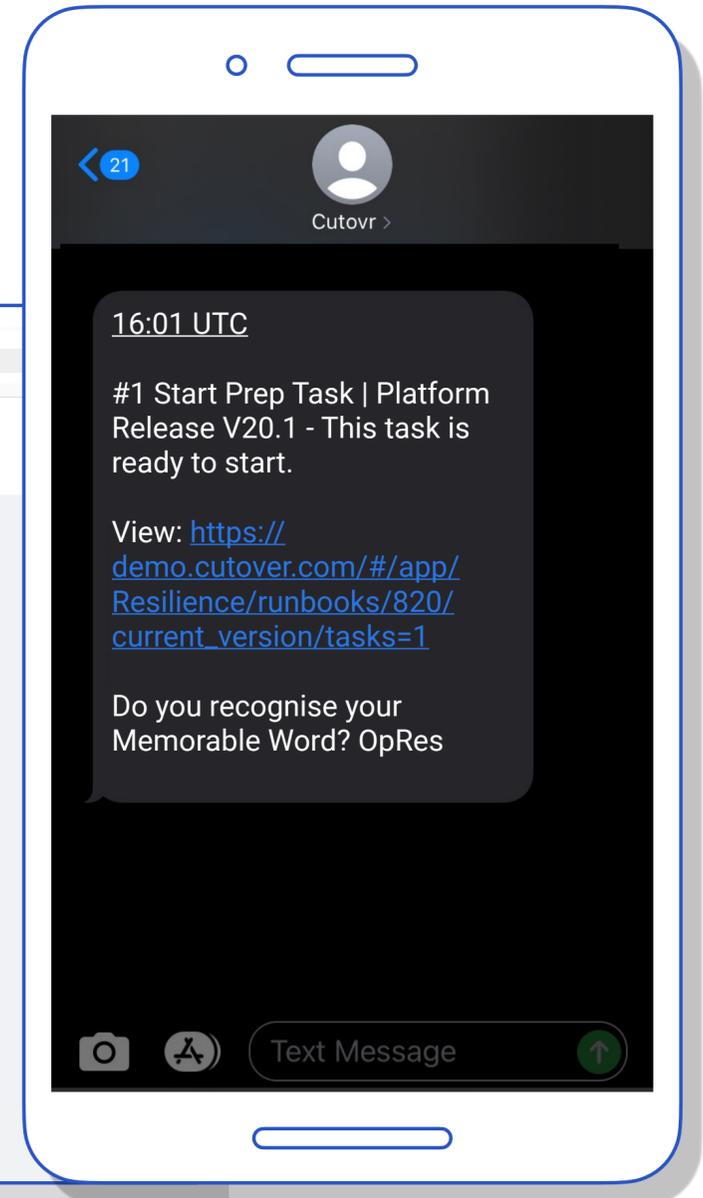
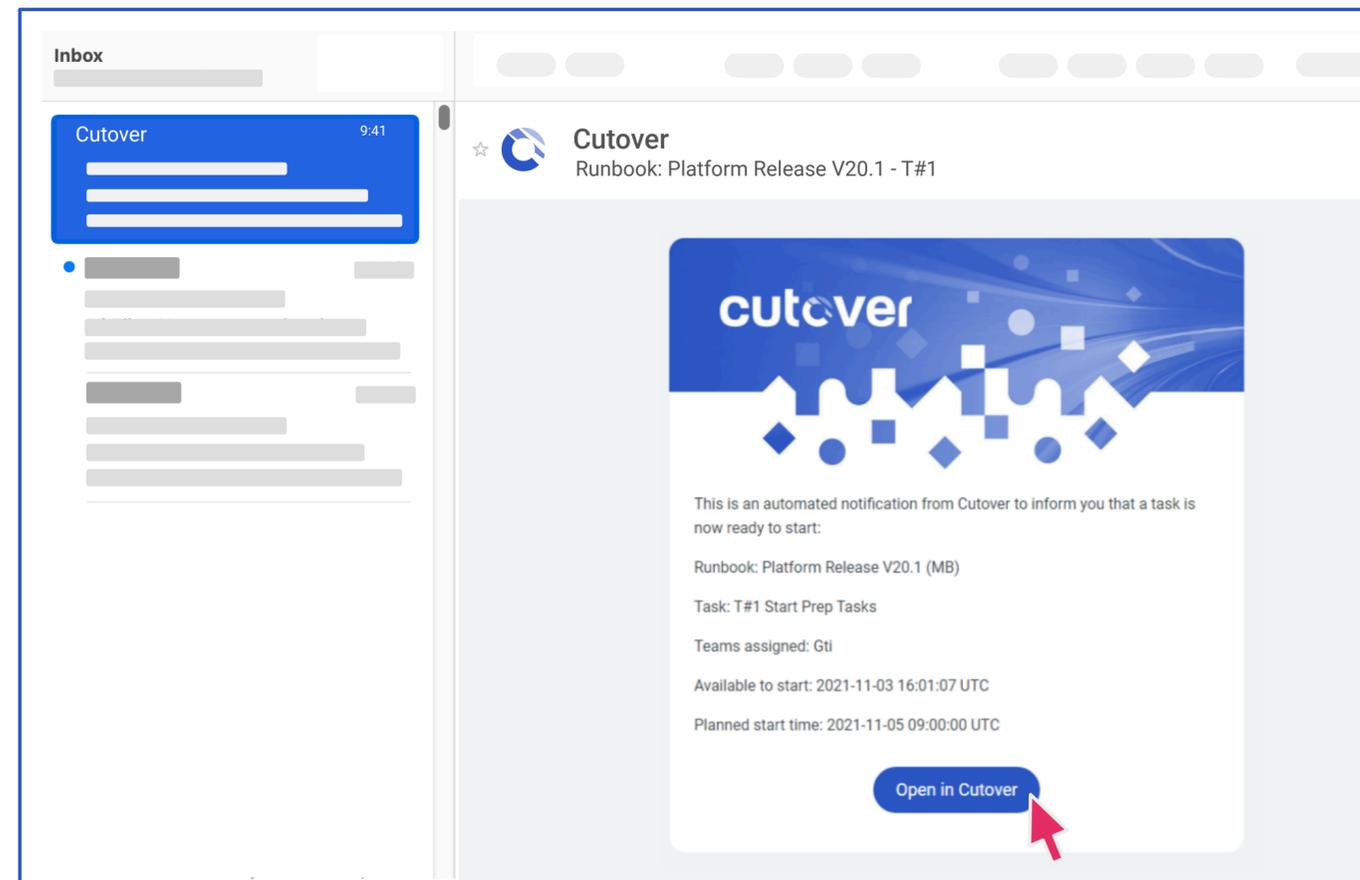
Once the runbook has been started by the Admin and they have turned on the communications options for all participants, notifications will be sent to inform the assigned team(s) or user(s) when a predecessor task has been completed and the assigned task has become startable as a result.



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.



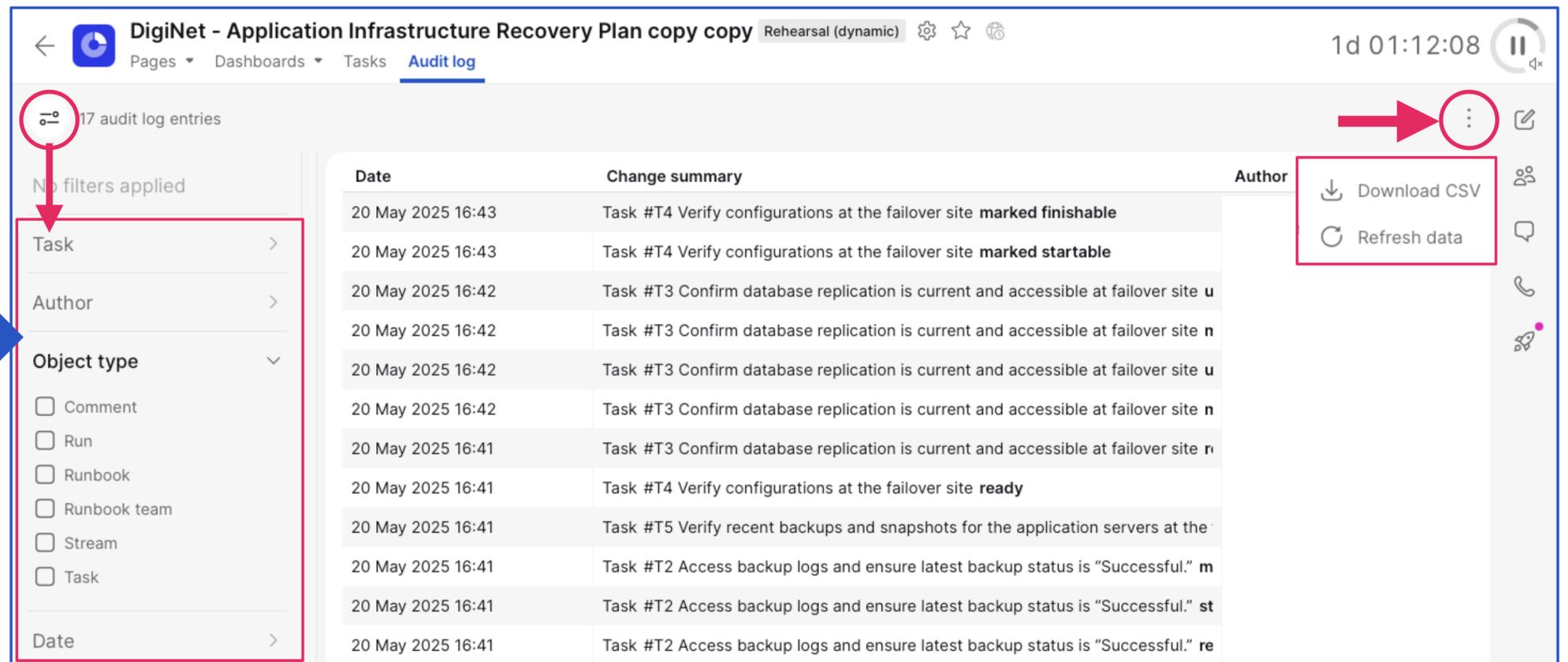
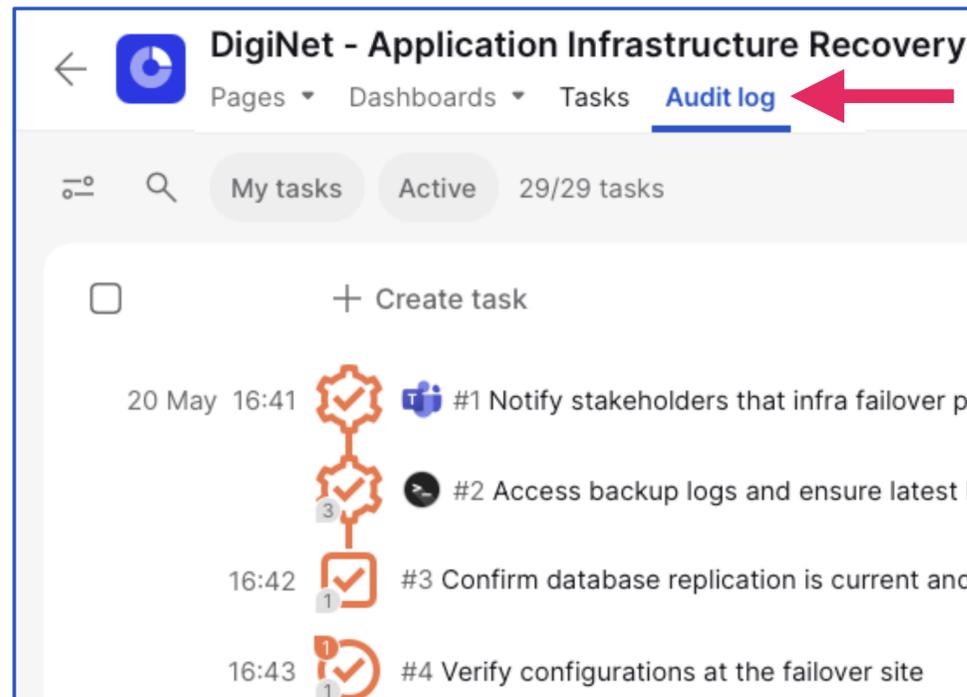
Audit Log

To access the audit log, go to the **runbook section** then 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.

Use the filters on the left of the audit log to focus on the items you would like to see.



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.

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%

- 0 Skipped
- 0 Abandoned
- 223 Complete
- 377 Running late
- 0 On track

	Total	Late
Complete	223	-
In Progress	2	2
Startable	12	12
Not yet startable	363	363
Totals	600	377

TASK COMPLETION OVER TIME

Number of Tasks vs. Time (18 Jan 04:30 to 22 Jan 02:06)

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.

02. Operational Resilience Operational Resilience

Dashboards Runbooks Central Teams

All Templates Snippets Save view 38/81 results

1 filter applied clear all

Folder (2) x

Folder Applied

- BCM 3
- Cyber Security 6
- Default 0

Select all runbooks

- CHG- AAP Recovery Plan [A] #544 • IT DR - Recovery Plans • +11h
- CHG- DGet Recovery Plan [A] #336 • IT DR - Recovery Plans • +24h
- CHG- Bitchip Recovery Plan [A] #550 • IT DR - Recovery Plans • -1h
- CHG- DeskGet Recovery Plan [A]

02. IT Disaster Recovery Technology Resilience

Dashboards Runbooks Snippets Central Teams

154/154 results

No filters applied

Folder

- 00. Event Templ... 1
- 01. Recovery Pla... 2
- 02. [Apr 23] DC2... 113
- 03. [Aug 23] DC1... 0
- 04. [Oct 23] DC1... 0
- 05. DC Failovers 18
- 06. Cloud Region... 20

Quick Filters

- In progress - live
- Starts within
- Ended within
- Late

Run Type >

Run Stage >

Central Team >

RAG Status

154

- 44 Green
- 20 Amber
- 15 Red
- 75 None

Lateness, by Runbook

154

- 39 (25%) On time
- 22 (14%) Less than
- 22 (14%) More than
- 71 (46%) Not in live

Apps - Failover in progress (Stage: Active live run)

- Cloud Region1 Failov... Due Mar 06 2024 03:49 (-... 84%
- Cloud Region10 Failov... Due Mar 06 2024 19:48 (... 15%
- Cloud Region11 Failov... Due Mar 06 2024 22:24 (... 22%
- Cloud Region12 Failov... Due Mar 06 2024 13:26 (-... 51%
- Cloud Region13 Failo... Due Mar 06 2024 03:45 (-... 84%
- Cloud Region14 Failov... Due Mar 06 2024 20:44 (... 13%
- Cloud Region15 Failove... Due Mar 06 2024 17:43 (... 22%
- Cloud Region16 Failove... Due Mar 06 2024 13:11 (... 51%
- Cloud Region17 Failov... Due Mar 06 2024 20:08 (... 15%
- Cloud Region18 Failov... Due Mar 06 2024 15:37 (... 32%

App - Completed Failover (Stage: Complete live run)

Jul 22 - DC1 Fai... Completed Feb 25 2024 07:13 (+...

Schedule Email

Schedule details

Timezone Local (default)

Currently scheduled

Once | Select details... Repeat frequency * Once

Sends at *

Recipient Users and Teams

Saved View

Email content

Enter a description...

+ Create Schedule



Post Implementation Review (PIR)

InfraSync - Application Recovery Plan (Pilo... Live Run (dynamic) complete

Pages Dashboards PIR Tasks Audit log

My tasks 48/48 tasks List Nodemap Table

No filters applied

Stream

- 01. Pre-Failover 19
- 02. Failover 7

10 Feb 13:27 #2 Email Comms: Prep activities for ...

#1 MS Tea... Connection failed (Setti...

Live run complete [View Post-Implementation Review](#)



InfraSync - Application Recovery Plan (Pilot Light) Live Run (dynamic) complete

Pages Dashboards PIR Tasks Audit log

Post-Implementation Review

This version was completed at 10 Feb 14:09

Overall Timings

START	FINISH	DURATION
13:27	14:09	42m 16s
10 Feb 2025	10 Feb 2025	- 4h 8m
+ 27m 9s	- 3h 41m	

Runbook Summary

Enter content here...

Execution Summary

Enter content here...

User Participation

Total Involved	Viewed Runbook	Performed an action
2	1	1

Lateness, by Task

48

- 43 On time
- 5 Less than 1.0h late
- 0 More than 1.0h late
- 0 Others

Performance vs Planned, by Stream

Note: Substreams are treated as being part of their parent stream

01. Pre-failover	1h 53m
19 tasks	2m 14s -1h 50m 46s
02. Failover	1h 5m
7 tasks	41m 28s -23m 32s
03. Validation Post-failover	2h
5 tasks	1h 56m -3m 10s
04. Failback	18m
6 tasks	59s -17m 1s

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.

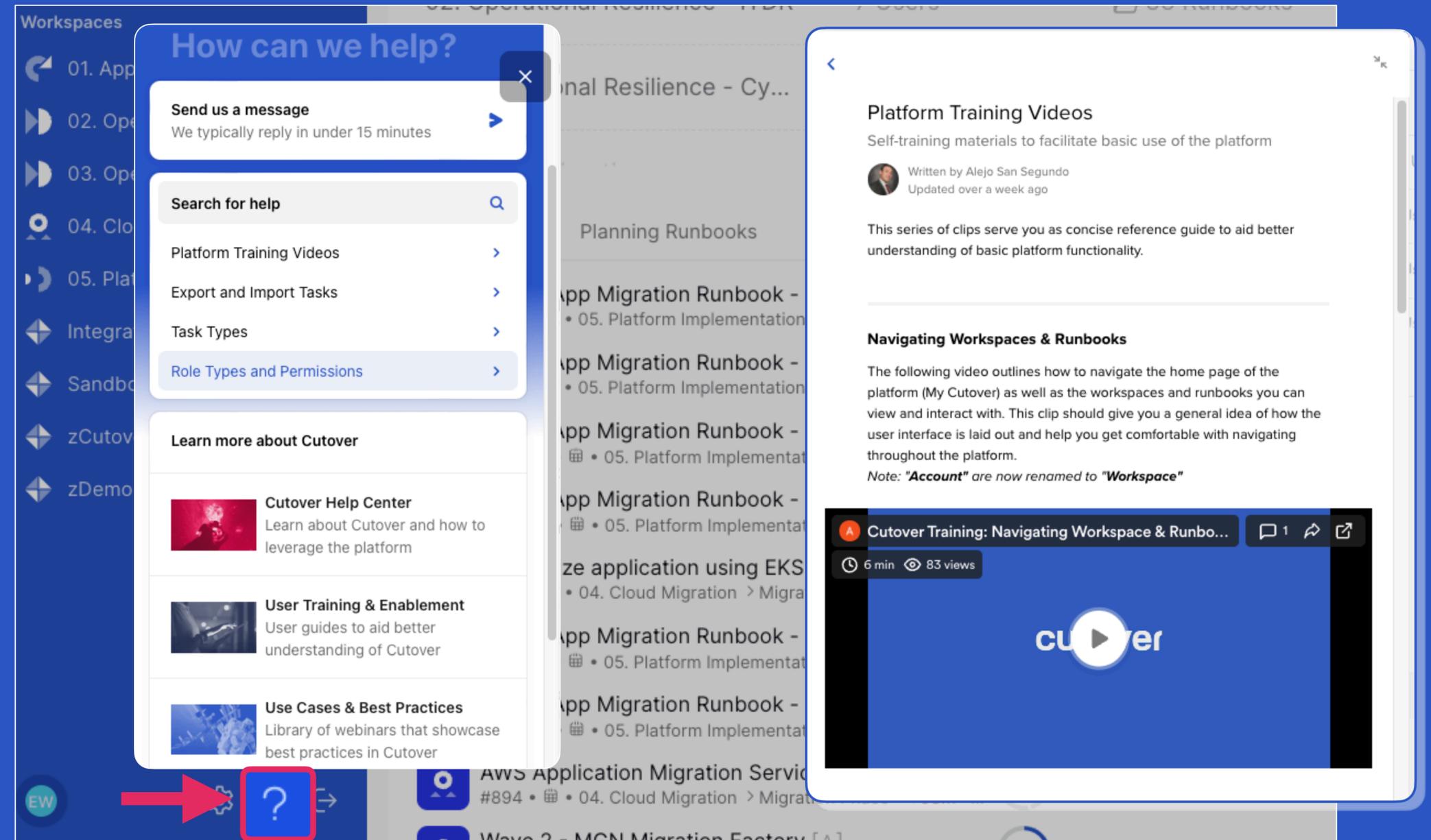
Anyone with access to the runbook will be able to view the Post-Implementation Review via the banner at the bottom of the runbook as long as the runbook is completed.

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 Developer Portal](#)



If you cannot access the In-App Chat Support, please contact support@cutover.com for further assistance and any technical queries.



cutover