

# Support Playbooks

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# Malformed docs.edb Issue

Troubleshooting Steps For Technician:

1. Answer the following questions/perform the following actions:
2. Unlock the .edb using the Unprotect tool
3. Open the file in DB Browser for SQLite and run the following under the "Execute SQL" tab:

PRAGMA integrity\_check

4. If any errors are found, export the query results to CSV.  
Lock the .edb back up using the Unprotect tool, then attach it and the CSV (and any other applicable logs) to an escalated ticket.
  - a. If no errors are found, run the pragma on their other edbs to see if another one is at fault, then get those logs. If no edbs give an error, attach all local logs they've gotten and a copy of their .edbs and proceed with attaching the information to an escalated ticket.

If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:

1. Provide answers to all the above questions and all requested attachments.

# Recycle Bin Purge Requests

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Are they getting an error when they attempt to purge their own items?
  - a. If so, what error message?
  - b. Do they have more success when attempting the purge from [beta.efilecabinet.net](https://beta.efilecabinet.net) ?
2. Are they needing to purge specific items or everything in their recycle bin?
  - a. If all items, confirm the date of the last deleted item.
  - b. If specific items, please provide the name and deleted date of the items in question, as well as the type of item they are.
3. Are any other users on the account able to complete the purge for them?

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to all of the above questions.
2. Please provide the admin email and the account ID (pulled from the Utopia Instances section of their account in the Hub).
3. Please provide email communication (or other validated form of identity and request) to confirm that they authorize the purge to take place on their behalf.
4. Confirm which user they would like the purge to display as having been completed by.

# Previewer Down Issues

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Is it all file types or just one?
  - a. If it's just one, is it just one exact file or are all files with that type that you try affected?
2. Does the issue persist in an incognito window?
3. Does the issue persist across multiple devices?
4. Does the issue persist across multiple accounts?
5. Does the issue persist for all user types?
6. Do the files in question have an actual size on them?
7. Is it failing on initial load or on the secondary smaller load window?
8. What error is displaying when you attempt to preview?

If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:

1. Provide answers to all of the above questions.

# Branding Removal

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Are they receiving an error message when they attempt to delete it themselves?
  - a. If so, what error is it?
2. Do they have permissions to modify branding?
3. Do they still have issues with this on [beta.efilecabinet.net](https://beta.efilecabinet.net) ?
4. Are there any other users on the account that can attempt to remove the branding?
  - a. If so, are they unsuccessful as well?
5. Does attempting to just edit the branding also cause the same issue?
6. Are you able to replicate the issue in your own account?

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to all of the above questions.
2. Please provide the admin email and the account ID (pulled from the Utopia Instances section of their account in the Hub).
3. Please provide email communication (or other validated form of identity and request) to confirm that they authorize the removal to take place on their behalf.

# Issues Sharing or Accessing Specific Nodes

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Is it an issue with sharing or an issue with accessing?
2. What error message populates when attempting to access/share?
3. Does the issue persist if they attempt on [beta.efilecabinet.net](https://beta.efilecabinet.net) ?
4. Do they have permissions to view the item in question?
5. Is it just one node or anything in the account?
6. Are you able to replicate the issue in your own account on any nodes?
7. If a sharing issue, does the issue persist if you share a child of that node you're trying to share (if the node you are attempting to share is a cabinet/drawer/folder)?
8. Does the issue persist in an incognito window?
9. Does the issue persist for another user?
  - a. If not, are there any differences between the failing user and the one that is having success that may narrow down the issue?

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to all of the above questions.
2. Please provide the admin email and the account ID (pulled from the Utopia Instances section of their account in the Hub).
3. Please provide the name of the node in question and its exact path in Rubex.

# User and Guest Addition, Edit, or Deletion Issues

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Are you able to replicate?
2. If yes, provide exact replication steps.
  - a. Have the user try on [beta.efilecabinet.net](https://beta.efilecabinet.net) to see if anything is different/grab the full error message.
3. What error are they getting?
  - a. Please provide the error message from system logs/dev console.
4. If edit/add is what is being attempted, get a list of what was changed/attempted to be changed and try to narrow down which change may be throwing the error if the error is unclear as to the issue.

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to all of the above questions.
2. If they require assistance removing a user or guest, please provide the admin email, the account ID (pulled from the Utopia Instances section of their account in the Hub), and the user or guest in question that they wish to delete.
3. Provide confirmation of validation of their identity and their desire to delete the user.

# SMTP Issues

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Are they unable to set/update/remove their SMTP settings, or are they just not receiving emails?
  - a. If they're unable to update them in some way, please provide the error message they are receiving (from system logs or the dev console of the immediate error is non-specific).
  - b. When they attempt on [beta.efilecabinet.net](https://beta.efilecabinet.net) , is the issue still present?
2. Is it personal or account level SMTP?
3. Are you able to replicate?
4. If they are just not receiving emails, confirm that the test button has been clicked to confirm that they are valid.
  - a. Also check with the customer to confirm if their password was changed on that end.
5. Do they have IP address restrictions on their email address server?
6. Do they have any two-factor on their email settings?
7. Confirm if they have made any changes at all on their email end since the last time emails sent out successfully.

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to all of the above questions.
2. If it is determined they wish to delete their settings, provide the username of the affected user (or account owner) and provide their account ID (pulled from the Utopia Instances section of their account in the Hub), as well as the provider they're using/any additional SMTP setting info.
3. If they wish to delete, provide validation of their identity and their request to delete the settings in question.
4. If you are able to replicate and it appears to be a bug, include replication steps.

# Renewal Issues

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Is the opp showing Closed Won in Salesforce?
  - a If not, their account representative will need to speak with finance to confirm if there is any additional work needed on their end or if there is a payment issue.
2. Does the account exist in the hub under the same email that the quote shows?
3. Does that email match what is listed on subscriptions in Salesforce?
4. Is the account active in the Hub?

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to all of the above questions.
2. If a manual update to the account is required of us (like an expiration date modification), please provide their account ID (pulled from the Utopia Instances section of their account in the Hub) and the expiration date required to be set.

# Slowness

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Which product?
2. Are you able to replicate?
  - a. If not, is it limited to one user on their account or everyone?
  - b. If one user, have they tried on another device?
  - c. Have they tried a different browser?
  - d. Have you verified their internet connection is sufficient?
  - e. Have you had them try on a different internet connection?
3. Is it overall slow or is it limited to a specific area in the program?  
If limited, which area does it occur in (or after performing which action does the slowness occur)?
4. Are there any error messages?
  - a. If so, please provide the error message in question.
5. Is the same slowness occurring on [beta.efilecabinet.net](https://beta.efilecabinet.net) ?
6. Is it transient (if you try a few minutes later, does the issue persist?)
7. Does using an incognito window make a difference?
8. Open up the dev console, network tab, and see time from request vs response (gives a good idea of timing).

**If all troubleshooting has commenced and the issue is still present (and determined to be on our end in some capacity), grab the following information for the escalated ticket:**

1. Provide answers to all of the above questions.

# Workflow Automation (Kicking off)

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Are you able to replicate?
  - a. If yes, is it with all WFs or just a particular WF on your account? If a particular, is there anything special about its configuration?
2. Have there been any changes to the WF recently/since the last time that it was able to be kicked off successfully?
3. Is the WF still showing Active in their WFs list?
4. Is it just the one WF or is it happening on all WFs?
5. What node type is it set on? Does it occur on other nodes? (Like a different drawer/folder than what it's currently set on?) Have you tried multiple node types to see if that's part of the issue?
6. In their WF settings, do they have either of the "Workflow requires" checkboxes checked? If so, which one? Does it conflict with what they have set as the automation action to kick off the WF?
7. If it's not affecting all WFs, does the same thing happen on a copy of the workflow (one manually recreated and one just copied via save as)?
8. Is only one user affected or are others unable to kick off the WF via automation?
9. What does the structure look like in the area it's kicking off in?

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to the above questions.
2. Provide the username of the affected user and provide their account ID (pulled from the Utopia Instances section of their account in the Hub)
3. Provide the exact WF name(s).
4. Provide the exact name of the node(s) that the automation is set on and the path.
5. Provide the WF configuration (if possible - if not, please get visible and clear instructions and/or screenshots of their exact configuration for each step/stage/settings).
6. Video recording where applicable.

# Stuck OCR Queue

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. How many items are waiting in the queue (if you are able to get an estimate)?
2. What is the file size (or average file size) of the files in the queue?
  - a. Files that are too large may time out before they are able to be fully processed.
3. Was this a recently migrated account (from EFCO or Desktop), or have they used one of our migration tools recently to mass import items?
  - a. Using Pangea or Pandora to migrate items in (either through a full migration or through just a regular data import) puts the files at a trycount of 2 in the system (so the mass import data doesn't clog up the queue).
4. What is the trycount on the items that are in the queue? Are there any error messages on any of the files?
  - a. If the items have a lower try count and have error messages, the error messages should give at least some indication as to why a file/set of files may not be processing.
5. Are there any similarities amongst the files that are in the queue? Were they all generated from the same place (like all scanned in, etc)?
6. Are any of the files in the queue ones that have their file versions updated frequently? How many file versions do the affected files have?
  - a. If a user updates a file version on a file before it's been processed through the OCR queue, it will add that new file version to the queue as the one that it wants to process first (and will not process the previous file versions until later), so if it's something they're updating regularly, it may be making it seem like it's not processing, when in fact the previous versions of the file just haven't been reached yet because it's deferring to processing the newest version first.

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to all of the above questions.
2. Provide the username of the affected user and provide their account ID (pulled from the Utopia Instances section of their account in the Hub)
3. Provide a sample of exact names of files in the queue (the more distinct the name, the better).
4. Video recording where applicable.

# Automation Failures in Portions of WF Instances

## Troubleshooting Steps For Technician:

Answer the following questions:

1. Are you able to replicate?
  - a. If not, proceed to the following questions.
  - b. If yes, are you able to replicate across multiple accounts/multiple users/multiple WFs using that particular step/automation, or just some?
- If it appears to be just certain WFs with the issue, continue to narrow down what might be specific about the affected WFs configurations. Proceed to answer the remaining questions in this list if it must be escalated.
2. When was the last time they were aware of that workflow/workflow step completing successfully?
3. Have there been any changes to the WF recently/since the last time that they were able to execute it successfully?
4. Review the step - is it actually fulfilled (meaning there isn't an approval waiting or any permissions issue that would prevent them from completing the action, or some profile routing that may not be able to complete due to a missing/invalid profile field)?
5. What type of step is it getting stuck on?
6. Are there other WFs in their account with the same issue?
7. Does the issue occur if the WF is kicked off by another user?
8. Does the same thing occur on a copy of the WF?
9. Does the same thing occur on a manually recreated copy of the WF?
10. Does the same thing occur if the WF or affected step in the WF is assigned to another user? (please verify both)
11. Is the WF/stage/step dealing with a pre-existing asset (one that existed before the WF instance was created) or was it created as part of the WF?
12. Are there WFs in their account that use this step that are completing successfully that can be compared to?
13. When did the issue occur? Has it just happened, was it yesterday, etc? If it was a different day, are they able to initiate a new instance of the WF and complete it without issue?
  - a. This is primarily to confirm if anything might have happened programmatically (like a batch worker issue, etc) at the time that could have caused the issue). The closer to the instance of failure that we are notified, the better.

**If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to all of the above questions.
2. Provide the username of the affected user and provide their account ID (pulled from the Utopia Instances section of their account in the Hub)
3. Provide the exact WF name and instance name.
4. If there is another WF that is not experiencing the issue but has the same setup, please provide its exact name.
5. Provide the WF configuration (if possible - if not, please get visible and clear instructions and/or screenshots of their exact configuration for each step/stage/settings).
6. Video recording where applicable.

# Email Issues

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Are you able to replicate?
  - a. Are you able to replicate in email delivery on both internal and external accounts? Is there any difference in success?
2. Which types of emails are affected and not affected (please provide a comprehensive list - MFA, password reset, workflow, document request, etc)?
3. Are the affected users using any custom SMTP settings at the user or account level?
  - a. If they are, provide the SMTP email endpoint they are trying to use.
4. Are the affected users using any email import settings at the user or account level?
  - a. If they are, provide the email endpoint they are trying to use.
5. If using any custom SMTP or email import settings, have they received their emails about hitting their limit, or are they seeing any errors when they go to view their SMTP/Email import settings or test them?
6. How long has it been since the email was requested/action was taken that would have triggered the email to go off?
7. Is anything in their spam folder?
8. Is this affecting just one user or many users (and if many, is it limited to one account or multiple accounts)?

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Answer the above questions.
2. If account/user specific, provide the username of the affected user and provide their account ID (pulled from the Utopia Instances section of their account in the Hub)
3. Video recording where applicable.

# Security Policy and MFA Authentication Issues

## **Troubleshooting Steps For Technician:**

Answer the following questions:

1. Are you able to replicate?
  - a. If it appears to be an Email Issue, please see the Email Issue playbook for more information.
2. Are they still experiencing the issue in an incognito window? Is the error the same or different?
3. Is this user or account-specific? If it is account-specific, are all users affected or just some users?
  - a. If user specific, is the admin able to remove it (either by adjusting the security policy for the user, or removing it from the user in the case of a security policy, or removing an MFA setting from the account level if it's set there)?
  - b. If many users are affected but not all, please provide a list of all affected users and their exact issues (failing security policy or MFA)?
4. Is their account active in the hub (both in status and in expiration date not being the same day or a prior date)?
5. If they are certain it is a security policy issue, what part of the policy authentication are they failing, and are we sure they are meeting the requirement?
  - a. Provide the part of the policy they are failing to authenticate on.

## **If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:**

1. Provide answers to the above questions.
2. Provide the username of the affected user and provide their account ID (pulled from the Utopia Instances section of their account in the Hub)
3. If it appears to be a security policy assigned to the account, please provide the exact name of the security policy assigned to the account (if the customer doesn't have the exact name but has a partial name, provide that).
4. Please provide the validation of their identity and the authorization from them that we are okay to make the change on their behalf.
5. Video recording where applicable.