

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.

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