

# 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.

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