Replay

In this Article

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Overview

The Replay feature allows users to reprocess Workflow-native Connector Steps and Form Steps from their response cards. A key use of this feature is identifying and resolving Connector Step errors, such as when an error occurs because a service is down or unavailable. With Replay, once you've determined the service is available again, you can replay the errored step to process the data. This feature supports workflow recovery without requiring a restart of the entire workflow.

With Replay, users can:

- Identify failed Connector Steps through error indicators and logs
- Reprocess Workflow-native Connector Steps
- Modify the connector configurations before replaying
- Reopen Form Steps

Supported Connector Steps

Currently, Replay is available for the following Workflow-native Connectors:

- Google Sheets
- Google Drive
- Microsoft Excel
- Microsoft SharePoint
- Box
- Dropbox
- Webhook

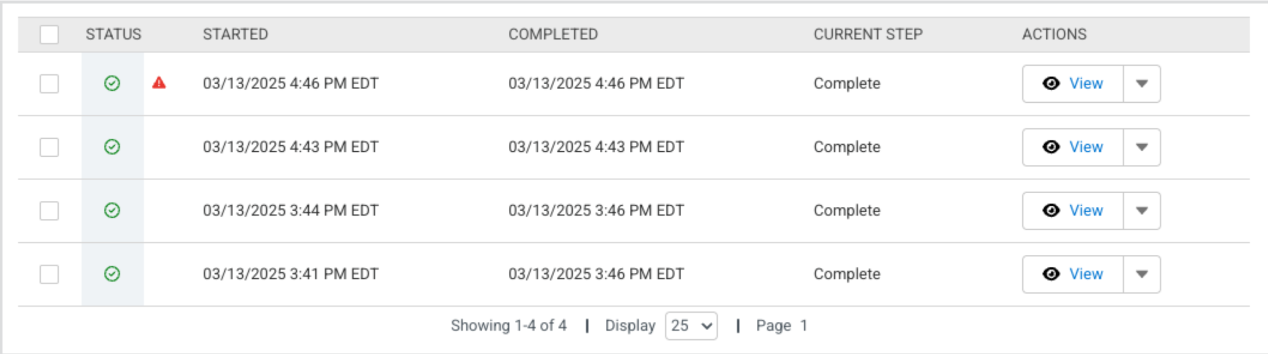
Workflow-native Connectors and Error Handling

When configuring Workflow-native Connectors, remember to set up the Error Handling tab. Enabling a workflow to continue after an error occurs is a best practice that leads to a smoother Replay experience. Directing Error Handling to proceed to the next step or a Thank You page are practical techniques, but every workflow is unique, so choose an error-handling scenario that is best for yours.

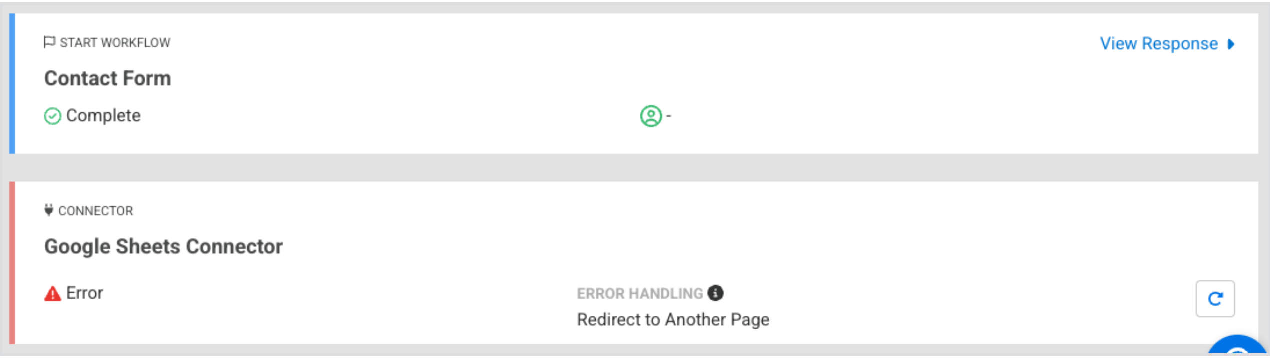
Identifying Connector Step Errors in Responses

When a Workflow Connector Step encounters an error, the response is marked with an error icon and is viewable on the Responses page.

Note: A Workflow Response can have a complete status and display a connector error. This state is called "complete with an error" and is important to consider when configuring Purge Settings.



Within the response, connector steps that encountered an error will be highlighted for easy identification.



The Connector Step card displays the following details:

- Error Status
- Error Handling Instructions

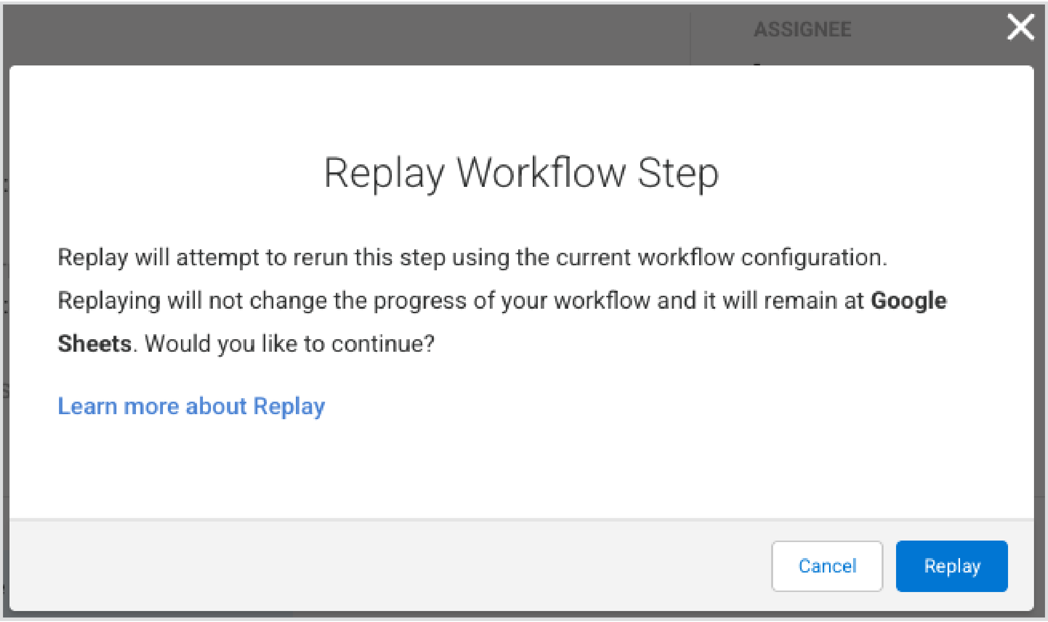
To investigate the error further, use the Workflow Logs page and Connector Logs.

Replaying a Connector Step

When a connector step fails, a user can attempt to replay the step instead of restarting the workflow.

How to Replay a Connector Step

- Locate the failed Connector Step card within the Workflow Response Record.
- (Optional) If needed, modify the Connector's configuration within the Workflow Builder before retrying execution to correct any issues.
- Click **Replay** (refresh button) in the Connector Step card.
- Review the information provided within the modal that appears.



- Select to **Replay** or **Cancel**.
- Status messages will appear in the upper right corner of the Response page, indicating whether Replay has started, completed successfully, or encountered an error.
- If Replay ran successfully and the Connector Step did not encounter further errors, the error icon on the Connector Step card will be cleared and display a Complete status.

Connector Step Replay Behavior and Considerations

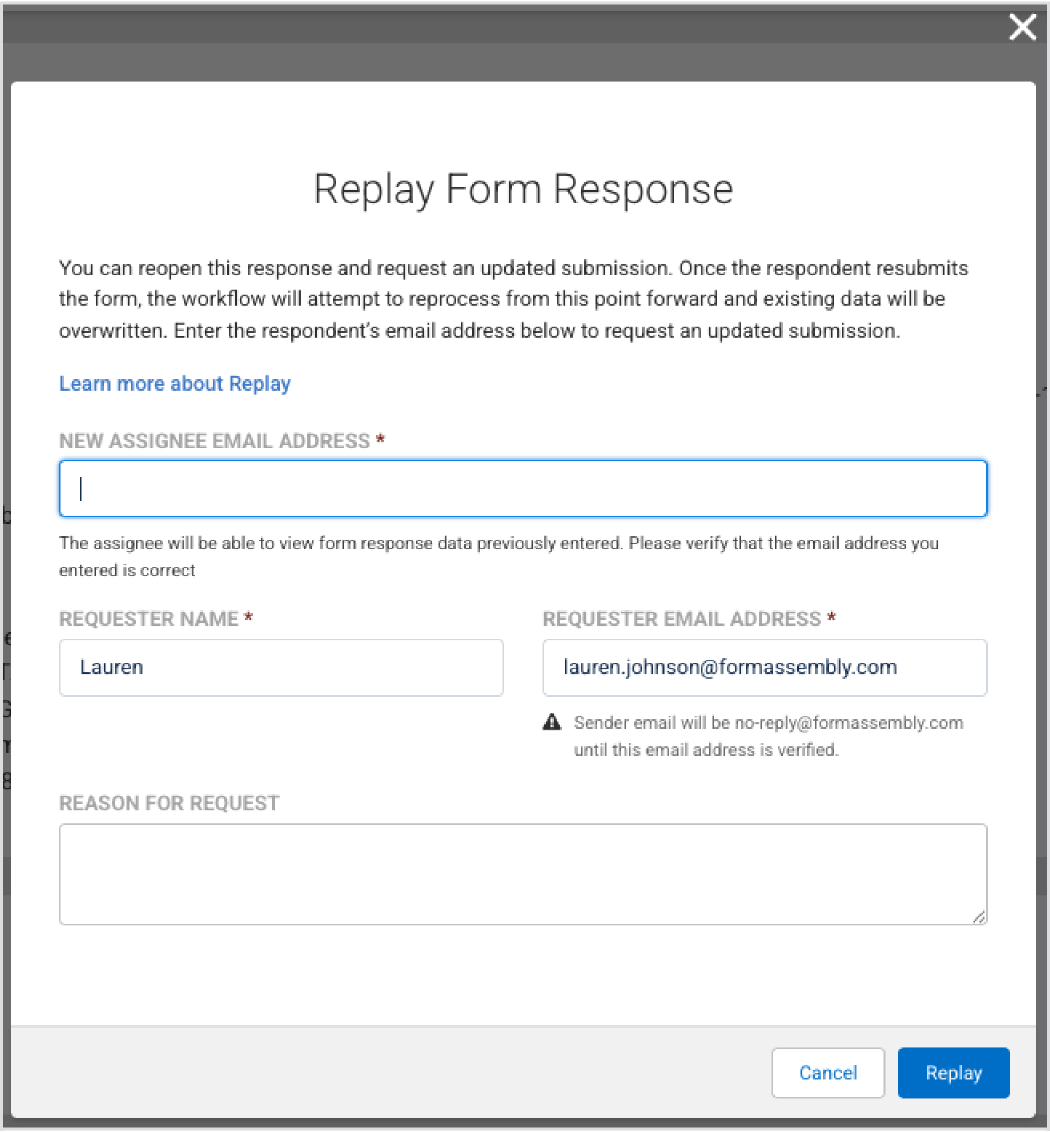
- Each Replay executes with the **most current Connector configuration**, ensuring that any updates made before replaying are applied.
- If the Connector Step fails again, additional Replay attempts can be made. Try further troubleshooting and adjusting the Connector configuration, and Replay again.
- Replay events are logged in the Workflow Logs and include the username of the Replay initiator.
- A Workflow Response that does not end in a connector step will be considered complete **even if a connector step fails**.
- **Purge rules for completed responses apply**, even when a connector step encounters an error in a completed workflow response.

Replay a Form Step

Running Replay on a form step works similarly to the Reassign Step function or reopening a response at the form level. Replay a form step to send the form back to a respondent, and return the Workflow to an In Progress state with workflow execution continuing at the selected Form Step.

How to Replay a Form Step

- Locate the Form Step card within the Workflow Response Record.
- Click **Replay** (refresh button) in the Form Step card.



- The following details will need to be filled in:
  - New Assignee Email Address
  - Requestor Name
  - Requestor Email Address
  - Reason for Request (optional)
- Select **Replay** or **Cancel**.

After clicking Replay, the new assignee will receive an email with a link to review and resubmit the form.

Note: Reassignment emails expire after 48 hours. Follow this link for more information about link expiration.

Upon clicking the Review Form button in the email, the form will reopen, and the respondent can enter the necessary or incomplete information. All fields marked as sensitive data on the form are cleared and will need to be re-entered.

Once the form is resubmitted, the workflow continues through all subsequent steps.

Form Step Replay Behavior and Considerations

- When a form is replayed, **all steps after the replayed form are also re-executed**. This behavior should be considered when replaying workflows containing payment connectors.
  - Suppose a form is replayed, and a payment connector is configured after the replayed step. In that case, the payment connector will execute again, which can result in additional charges to your customer if they re-enter their payment card details.
- Replay events are logged in the Workflow Logs. They include the username of the person who initiated the Replay action and the new assignee's email address.
- Statuses displayed on cards of a response retain their prior information until the workflow completes the re-execution of the step due.
  - For example, if a completed approval step exists after a form step, the approval will**still display as Complete** when the form step is replayed, even if a new approval needs to occur.
  - After a Replay, **when a workflow response displays an In Progress status, utilize the Workflow Logs to determine which step is in progress**.
- A form with a signature can be replayed, whether or not it has been sealed.
- The Workflow Response will reflect the latest e-signature given and its record link.
- Old e-signature record links can be found in the Workflow Logs.
- Complete form steps can be replayed.
- Form Replay may be restricted if modifications, such as the addition or removal of workflow steps, or alterations to form or step identifiers, have been made since the original response was recorded.