Softdocs etrieve - Troubleshooting Tips for Users

KNOWN ISSUE

- Mac Safari users can't sign forms. A form can be filled out in Safari & it saves as draft, but the signature pop up window does not display fully. Please open the form in another Mac browser to sign it.

TROUBLESHOOTING IDEAS

1. Refresh browser tab/window.
2. Close multiple instances of Softdocs etrieve. Inactive tabs/windows time out & cause all other tabs/windows to fall asleep.
3. Sign out, then sign in (top right corner settings wheel icon).
4. Delete a "draft" and start with a new, fresh form. This is good when a form won't pull in data via an integration.
5. Clear browser history/data/cache for ALL TIME. If you don't know your passwords and/or do not want to do this, then try an Incognito/Private browser window. The system gets confused if more than 1 sign-in credential is used in a browser. For example, if you have a DU student account and a DU student worker account. Or if you have staff account and a student account. Incognito/Private browsers will force a sign in with a specific account.
6. Try using a different browser (Chrome, Edge, Firefox, Safari, etc.)
7. Shut down/restart.
8. If a form is not visible in the etrieve Central form list, then please submit a [Support Ticket](#).
9. If a submit/approve/review button is not showing at the bottom of a form (or is greyed out), then a required (red asterisk) field needs attention. If that is not the case, then please submit a [Support Ticket](#).

COMMON PROBLEMS

- Classes/courses won't display in a dropdown. Have you picked the academic year and academic term? This needs to be done before integration can run. Did you choose the correct year/term?
- Softdocs frontegg error message. Please submit a [Support Ticket](#).
- Softdocs "couldn't sign you in / invalid email domain" error message. Please submit a [Support Ticket](#).
- You can't see a form in your etrieve Central Submissions list. The default view is "Needs Review" which means forms YOU needs to act on. Click "Clear all" at the top of page and ALL forms you touched or that have been assigned to you will show. "In Progress" means SOMEONE ELSE needs to act on form.
- Package is Overdue email is a reminder that a form is sitting at your step in the workflow too long. Verify you submitted the form. Maybe you just signed/dated it, but did not click submit/approve button. Verify all required fields (with red asterisk) are complete. If it is not any of these things, then please submit a [Support Ticket](#).