Common Support Troubleshooting

Let this be a checklist for triaging common support inquiries

Admin/General

Can't log in
- Are they using the correct email address?
- Are they using the correct server?
- Are they using the correct login method? (Local, Google, SSO/SAML)

- Is the user Inactive?
- Is the user verified?
- Are all Mandatory fields in the Accounts Dashboard filled out?
- If the user is stuck on the billing page or kept getting redirected to the pricing page, then check the following:
  - Is there a suspension on the account? Check their Account Dashboard.
  - Is the account Inactive?
  - Are they getting redirected to a possible expired account? Check on Salesforce with the user's full name, email, their company domain… sometimes users have multiple accounts across different deployments using different emails. In this case, clearing cache/using the Incognito browser would help.

Not getting password reset email

- Is the user inactive?
  - Are there specific restrictions while setting up the password (min 20 characters etc)
  - Has the user verified their account?
  - Does the user use SSO to log in?
  - Did we actually send one from the back-end? (check Sendgrid)
  - Does the user use a VPN?
  - Is noreply@roadmunk.com added as a safe sender? (check their Junk/Spam folder; Whitelist our IP address)

Not getting the verification email

- Is the account active?
  - We can check this by going to their Account Dashboard by using RMID or the user's email
  - Our system wouldn't send out emails if the account is expired or suspended.
- Is the user active?
  - We can check if the user is active by going to their Account Dashboard - Users tab
  - If the user is inactive, we would direct the user to reach out to their Account Admin to set them to active first.
- Did we actually send on from our end?
  - Yes.
    - Take a screenshot of the Sendgrid result and use the Zendesk macro: Verification Email not Sent
  - No. Likely we would need to delete the user and have their teammate reinvite them to restart the initial setup and help them to get verified. Before deleting the user, make sure to check the following:
    - Are they the only Account Admin?
      - If they are, we would need to promote other users to Account Admin before the deletion;
      - If they are the only user on the account, we would need to ask the user to invite another user in if possible using a different email address of theirs, then promote the new user account as an account admin
    - Check if they own any Product Areas in the Feedback module? If they do, advise the user to assign the Product Area they own to some other users before the deletion
    - Once the user is deleted, all the roadmap they previously owned will become "no-owner" and are only accessible by the Account Admin(s).

Not getting an invitation email to join the team in Roadmunk

- Is their email affiliated with another account?
  - Did the Admin share a single roadmap with them, or actually invite them to the account? (they must be on the account first)
  - Did the Admin add them manually or via CSV?
  - Did we actually send one from the back-end? (check Sendgrid)
  - Does the user use a VPN?
  - Is noreply@roadmunk.com added as a safe sender? (check their Junk/Spam folder; Whitelist our IP address)

Not seeing features

- Check what features are included in their plan/package
- If they are not seeing certain features in Feedback & Idea modules, advise the users to reach out to their Admin and see if they have turned on the permissions.
- Check the following questions:
    - Clear browser cache & refresh
    - Make sure users are on the latest version of a supported browser
    - Make sure there are no VPNs or Ad-blockers in place.

FAQs in Admin/General

Problem: Users have Performance Issues

Solution: We could ask some Additional Questions as well as providing some Tips and Tricks.

Problem: User cannot get past Welcome page

Solution: They are not meeting Enterprise password strength (and we are not currently giving them a prompt). Passwords must:

- Not contain the first name, last name or email prefix of the user
- Be at least six characters long
- Contain characters from the following four categories:
    - Latin uppercase letters (A through Z)
    - Latin lowercase letters (a through z)
    - Base 10 digits (0 through 9)
    - Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).

Question: Does Roadmunk provide audits? How do you audit Roadmunk?

Answer: Roadmunk keeps full operation and activity logs in the third-party tool Papertrail. This data is reviewed by senior developers and can be sanitized and provided to clients in the case of a security incident or court order.

Question: Where are our servers located?

Answer: We have three main deployments of Roadmunk, hosted by Amazon Web Services (AWS) that serve different geographical regions:

APP (Americas) - The server is located in the state of Virginia in the United States.

EU (Europe) - The server is located in Ireland.

APAC (Asia, Middle East, Pacific) - The server is located in Australia.

Roadmapping

Can't see any roadmaps

- Have any been shared with them?
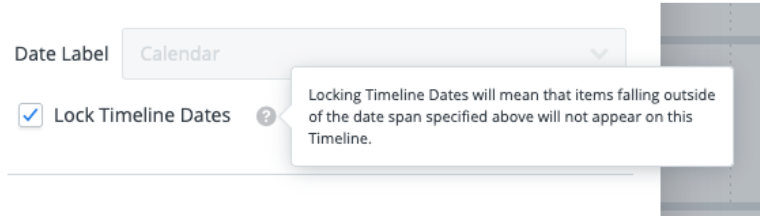   - Check roles/permissions?

Can't create a roadmap

- Do they hold a Reviewer license?

Some items have disappeared

- Were they deleted by their teammates that also have access? Support might be able to use Amplitude to see if there were item-deletion actions on this account.

- If they are on a Timeline view, check the "Date Preferences" setting to see if they selected the "Lock Timeline Dates". If so, there's a possibility that certain items were zoomed out.

Date Label   Calendar

Locking Timeline Dates will mean that items falling outside of the date span specified above will not appear on this Timeline.

☑ Lock Timeline Dates ?

Roadmap(s) have disappeared

- Did you delete the roadmap?
  - Have you looked under the "All Roadmaps" section
  - Were you removed from the roadmap, or was the owner reassigned?
  - Is it archived?

Dependencies don't work

- You cannot create dependencies with:
  - Jira-linked items
  - Parent items/Sub-items
  - Milestones
  - Bucketed dates

Can't visualize all data on the roadmap

- Are any filters on?
  - Is Hide Empty Headers on?
  - What is chosen to be displayed at the bottom of your formatting panel?
  - Do they have "Lock Timeline Dates" selected in their Date Preferences?

Export is not working

- Refresh and try again?
  - Try other export types to see if it's across all types or just one?
  - Try and re-publish?
  - Duplicate the view, and try a new publish?
  - Archive the roadmap, then restore?
  - Is it a JIRA synced roadmap?
    - Must ensure that items are still linked in Jira

Can't add items

- Are you on a Master roadmap? (can't add items to master, just to sources)
  - Do you have Edit/Owner permission, or read-only permission?

Can't delete items

- Does the item have sub-items?
  - Do they edit permissions on this roadmap?

Can't delete a field

- Are you on a Master roadmap?
  - Is it a Native field? (Date, External ID, Milestone Type) - these cannot be removed or merged

- Do you have permission to accomplish this (are they an editor of that field)?
- Has the field been archived?
- Is it a Jira synced field?

Can't remove a filter?

- Are they running into our header cap? (is there a circular arrow icon to the left of the filter name)
  - We can increase this above 25 in the back-end of the account as an add-on

Can't change dates on an item?

- Is this on a Portfolio roadmap? If so, do you have Edit access on the specific Source roadmap in which the item belongs to?

Don't see the Template option on their homepage anymore?

- Check their Account Dashboard to see if the "Disable Roadmap Creation From Template" option is selected

FAQs in Roadmapping

Question: How does Publish to URL technically work?

Answer: Publish to URL creates an interactive HTML link on the Roadmunk server. The image is hosted in the Roadmunk cloud, but users have full control over the password and publishing frequency of the image.

Jira

- **Can't see a field in Roadmunk:**
  - Is it on their Create Issues screen on the integrated project in Jira?
  - Does this field perform calculations?

FAQs in Jira Integration

Question: How exactly does the Jira Integration work, specifically to an on-prem sever (is it inbound, outbound, by IP, etc.)?

Answer: The Jira integration works by utilizing the Atlassian public REST API. This is a standard part of the Jira tool which lets users run API calls to edit or view data.

The API calls are all sent over the internet using HTTPS with TLS 1.2 or stronger enforced. It can work for both Jira Cloud servers as well as Jira's on-premise solution. Basically a user configures a Jira integration in Roadmunk, and Roadmunk uses that user's credentials to

pull/push data from Jira and render it in Roadmunk.

There are a number of different use cases and applications. The key takeaway is that the integration doesn't scrape all data from Jira. Rather, it selectively accesses subsets of data that the named user already has access to.

> ℹ️ Check out Jira Integration - Common Errors and Jira Bootcamp for more use cases and resources

SSO Setup

The user receives a "CANNOT GET" error code?

Check the Account Dashboard → Users: have they logged in using SSO before?

- If No, go to login.roadmunk.com using an Incognito browser → "Send another setup email"; Or you can send another verification email through the User page on Account Dashboard. (When resenting the emails, make sure to also check if there's any capitalized letter - make sure it matches the email in the Account Dashboard.)
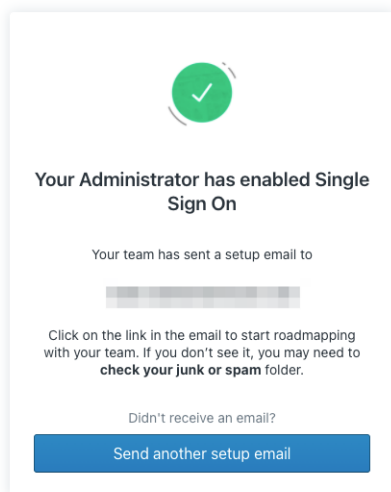
  - If they already have SSO setup on Account Dashboard, double-check by going to login.roadmunk.com using an Incognito browser, and you should see something like this:
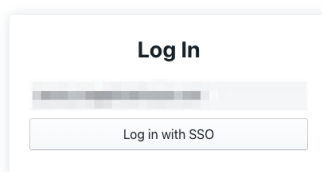
    In this case, there are two possibilities:
    - Are they logging into Roadmunk through their third-party SAML provider? We don't surface activation block messages unless they log in from login.roadmunk.com

- There's also a possibility that the user is not added to the correct user group when the team was setting up their SSO - an Account Admin or someone from the user's IDP side should be able to confirm this.

FAQs in SSO Setup

Question: What's the difference between Google OAuth and Google SAML? Do I need the Professional plan for Google OAuth?

Answer: SAML and OAuth are standards and nothing proprietary about Google.

SAML - Security Assertion Markup Language - it is XML based syntax that asserts that your identity (John/Jane Doe at XYZ Company) has been authenticated and the identity attributes (Name, address, phone, title, specific roles, etc) are described in XML Document, digitally signed (optionally encrypted) and sent to Receiving Party (Google).

OAuth - OAuth is not technically for Authentication. OAuth is used to control authorization - what you can or cannot do within a Service.

Question: How do you enforce SAML for published URLs? Does the account need to be on Professional? Is there documentation on this?

Answer: Only Professional+ packages can have URLs behind SAML. Once the Account has enabled SAML (Account Settings > Security) - the Account Admin can enable URLs behind SAML in the Account Settings > Company tab. Then, SAML for URLs can be removed from Views individually.

> ℹ Check out this article - SSO Setup for more use cases and resources
> Also useful to check this Errors and Pop-ups Guide.

FIM

Can't see all Product Areas and Components?

- Are they listed under the 'Inactive Products' tab?