

Troubleshooting The Sign Up/Sign In Process

A guide to help troubleshoot any issues people might have during the sign up/sign in process



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Troubleshooting the sign up/sign in process

This document will take you through the sign up/sign in process and the most common issues that users might experience if the account isn't set up correctly. It will run through the errors you might see and how to fix those errors as well as common mistakes that occur when setting up an account.

Correct set up of accounts

Feature accesses required for basic Loop access (all users need this)

Rostering feature accesses are all the same as they were in EmployeeOnline. If your organisation was already using EmployeeOnline or the Me App, you can use the exact same feature accesses in Loop to get access to all rostering based features.

However, in order for these feature accesses to display, there are additional three feature accesses that need to be assigned to all users for Loop. These feature accesses are:

- **Services: Allocate Loop**
- **Services: Loop Rostering**
- **Services: Ref Data**

Account set up required for users who haven't used Me, eCommunity, RosterPerform 11 or Single Sign-On

In order for a user to be able to connect their Loop account with the account you have set up in HealthRoster, you need to ensure the following requirements have been met with the account. Please note, **this is only for accounts that are not already connected to Me, eCommunity, RosterPerform 11 or use Single Sign-On.**

- The **External Identity** field must be empty
- The account must be linked to an employee
- The account must be active
- The account must have the three feature accesses mentioned above, along with the required rostering EmployeeOnline feature accesses.

Account set up required for users who are currently or have previously used Me, eCommunity, RosterPerform 11 or Single Sign-On

If you have an account that has currently or previously been connected with Me, eCommunity, RosterPerform 11 or Single Sign-On, then you will see that the **External Identity** field will already be populated with an email address. On these occasions, you don't need to sign up to Loop, you only need to sign in using the same credentials you had for that account. So, to log in, use the email

in the **External Identity** field and then the password that you used to log in to that account. If you don't remember the password, Loop will give you the option to reset this password in the login screen. Just remember that whatever you change that password to, will become the password you will need to use if you use any of the other three products again. Note with Single Sign-On, you won't be able to reset your password from Loop.

The account will still need to have the following set up in order for Loop to work:

- The account must be linked to an employee
- The account must be active
- The account must have the three feature accesses mentioned above, along with the required rostering EmployeeOnline feature accesses.

Tips on signing up Loop accounts

What's the best email address to sign up to Loop with?

The best email address to sign up to Loop with would be a personal email address. Loop accounts are designed to be taken with a user when they go from one organisation to another. They also support signing up to more than one organisation at a time in scenarios where people work in multiple organisations at once. As such, in order for the account to continue to work once a person moves on, it's best they use an email account that they have control over once they leave an organisation.

If they use a work email and choose to move organisations, they won't be able to log in to Loop anymore once that email address has been closed. They can then sign up fresh in the new organisation with a new email address, but they will lose all previous entries made against their profile and any connections they had previously made.

Do I have to add my phone number to my Loop account?

No. This is a completely optional choice, only email user names are mandatory. You will see on the screen asking to link your phone number that there is an option to skip that step.

However, it does make the sign-up process a lot easier if they do choose to sign up with a phone number as well.

What does signing up with my phone number mean?

Signing up with your phone number means that users aren't reliant on remembering their username and password to log into Loop. All they need to do is enter their phone number and then put in the code sent to them via text to log in.

If I don't add my phone number on the initial sign up, can I enter it in later?

Yes, all you need to do is log out and log back in again. After you have entered your username and password, you will be brought back to the screen offering you the option to link your phone number to your account.

If I sign up with my phone number, will that make my number available for people to see?

No, the phone number used to sign into Loop sits separate from any information that is stored in HealthRoster or Loop. None of your colleagues will be able to see that number in the app or in HealthRoster so it is completely secure.

Can I use my number on a second account if I've used it previously on another Loop account?

At the moment, no. In 2023, we will be introducing a way for users to amend their own login details directly from the app, this will include being able to change the email address login, phone number and name. When this is available, they need to just remove their phone number from the previous account and then use it with the new account.

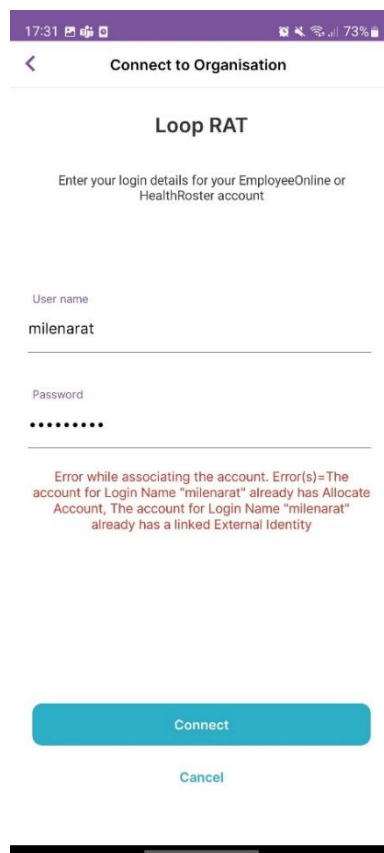
Can I change my login details in Loop after signing up?

At the moment, no. In 2023, we will be introducing a way for users to amend their own login details directly from the app, this will include being able to change the email address log in, phone number and name.

Troubleshooting error messages in Loop when connecting to an organisation

Below is a list of potential error messages that might occur when a user has created their Loop account and is attempting to connect that Loop account with your organisation, and the steps that you need to take to fix the issue in these cases.

“Error while associating the account. Error(s)= The account for Login Name [User name] already has Allocate Account. The account for Login Name [User name] already has a linked External Identity”



Scenario One

This error message will appear if the HealthRoster account the user is trying to connect to already has an email address in the **External Identity** field. If the user is already using Me, eCommunity, or RosterPerform 11, they need to log out and sign in using the email address in the **External Identity** field. When doing this, they will then see that their Loop account is already connected to your organisation and they won't need to do anything else.

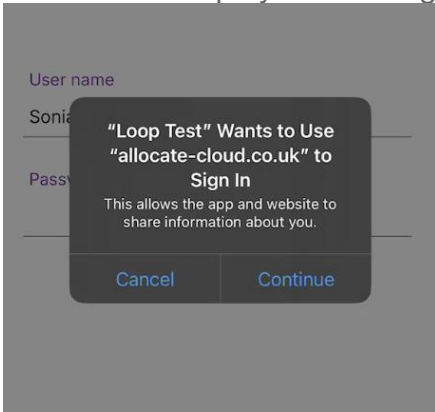
Scenario Two

Another reason for this populating is that they are using Single Sign-On. In which case, they need to log in with their Single Sign-On details and again will see that they are automatically connected to your organisation.

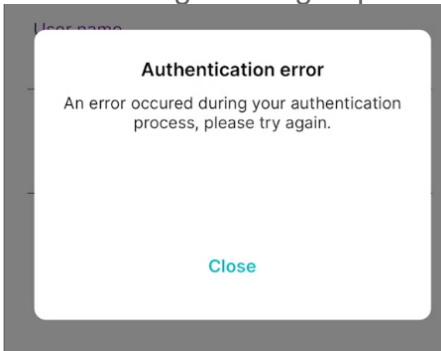
Scenario Three

Finally, if the user is signing up for the first time and seeing this error message then it may have occurred on an iPhone due to the following steps having taken place:

1. End user has entered in the correct HealthRoster credentials on an iPhone when connecting to your organisation.
2. The iPhone displays a message box as below with the option to press **Continue** or **Cancel**.



3. The end user presses **Cancel** instead of **Continue**.
4. The following message opens.



5. The user presses **Close** and is taken back to the **Connect to Organisation** screen with a continuing loading icon.



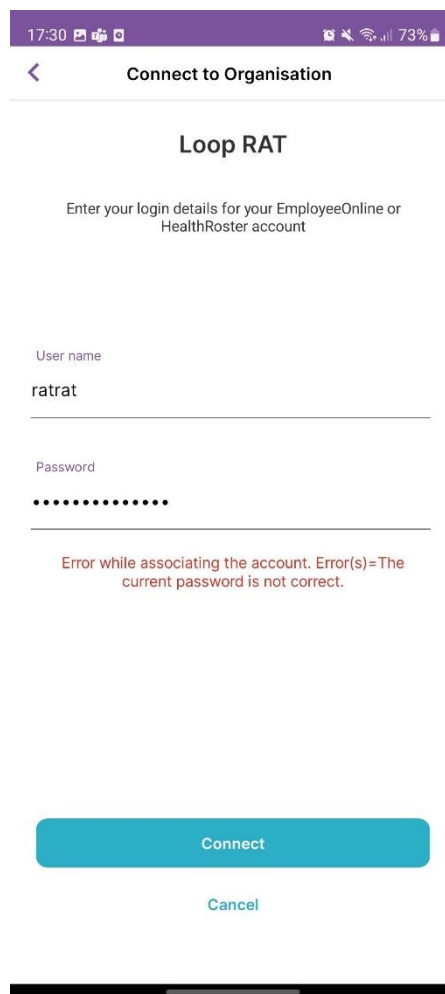
6. The user presses **Cancel** and is taken back to the **Connect to Organisation** list.
7. The user attempts to connect to your organisation again and is met with the above error message.

On this occasion, they need to cancel and choose to **Connect Later**. Then if they log out and sign in with the Loop account that they have just signed up with, they will be logged in successfully with the Loop account and connected to your organisation.

Scenario Four

If you aren't using Single Sign-On and none of the above apply. Or if they once used Me, eCommunity, or RosterPerform 11 but no longer do and want to connect a different email address to the account than the one in the **External Identity** field, then you just need to delete the email in the **External Identity** field and save your changes. The user should then be able to connect to the organisation with their new email address and populate the **External Identity** field with the new email.

“Error while associating the account. Error(s)=The current password is not correct.”



The screenshot shows a mobile application interface for connecting to an organisation. At the top, the status bar displays the time 17:30, signal strength, Wi-Fi, and 73% battery. The app header is purple with a back arrow and the text 'Connect to Organisation'. Below this, the title 'Loop RAT' is centered. A subtitle reads 'Enter your login details for your EmployeeOnline or HealthRoster account'. There are two input fields: 'User name' with the text 'ratrat' and 'Password' with masked characters. A red error message is displayed below the password field: 'Error while associating the account. Error(s)=The current password is not correct.' At the bottom, there are two buttons: a teal 'Connect' button and a blue 'Cancel' button.

This error message will appear if the user name has been recognised but the password doesn't match the HealthRoster account. To fix this, you can reset the password in HealthRoster either through the manual or automatic process that is available. Once done, they just need to try again with the new password and they will be able to get in successfully.

“Error while associating the account. Error(s)=User Account for Login Name [User name] cannot be found”

The screenshot shows a mobile application interface for connecting to an organization. At the top, the status bar displays the time 17:30, signal strength, Wi-Fi, and 73% battery. Below the status bar is a navigation bar with a back arrow and the text "Connect to Organisation". The main content area is titled "Loop RAT" and contains the instruction "Enter your login details for your EmployeeOnline or HealthRoster account". There are two input fields: "User name" with the text "ratprat" and "Password" with masked characters ".....". Below the password field, an error message is displayed: "Error while associating the account. Error(s)=User Account for Login Name (ratprat) cannot be found". At the bottom of the form, there are two buttons: a teal "Connect" button and a blue "Cancel" button.

This error will occur if the user name that the user is trying to connect with doesn't exist anywhere in your HealthRoster. In order to resolve this issue, you will need to check the user name that they are attempting to use and make sure that it matches with the one that you have set up for them.

“The account is already associated with selected trust”

19:49 [status icons] 60%

< Connect to Organization

TEST1124RQA

Enter your login details for your
EmployeeOnline or HealthRoster account

User name
camille

Password
••••••••

The account is already Associated with selected
trust

Connect

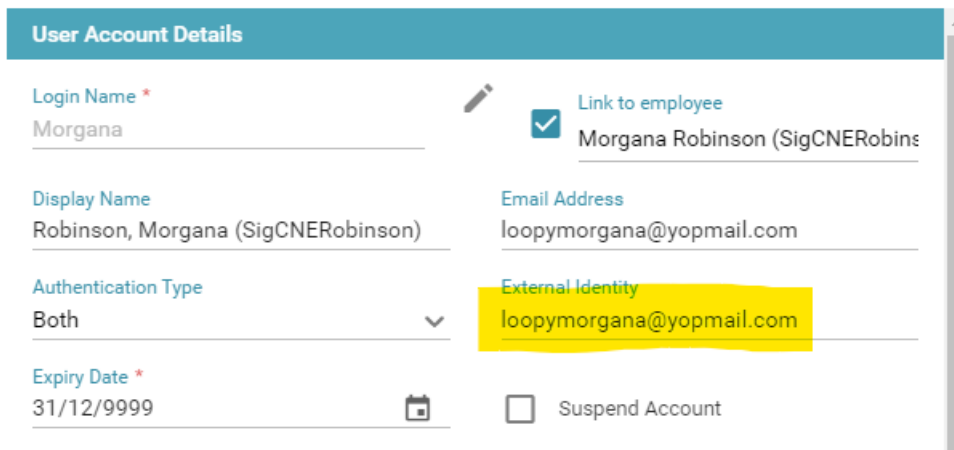
Cancel

This most typically will occur when a person has attempted to connect to an organisation in an area with bad signal or network connectivity and the process timed out. If they then try to connect again within the same log in period, they will see the above message. To fix this, all they need to do is log out and log in again. They will be automatically connected to the organisation.

Managing queries with active accounts

How to help if a user can't remember the email they used to sign up to Loop

If a user can't remember the email account that they signed up to Loop with, you can find this email address in the **User Accounts** section in HealthRoster. After finding their account in HealthRoster, whichever email address is populated in the **External Identity** field is the email address that they used to sign up to Loop.

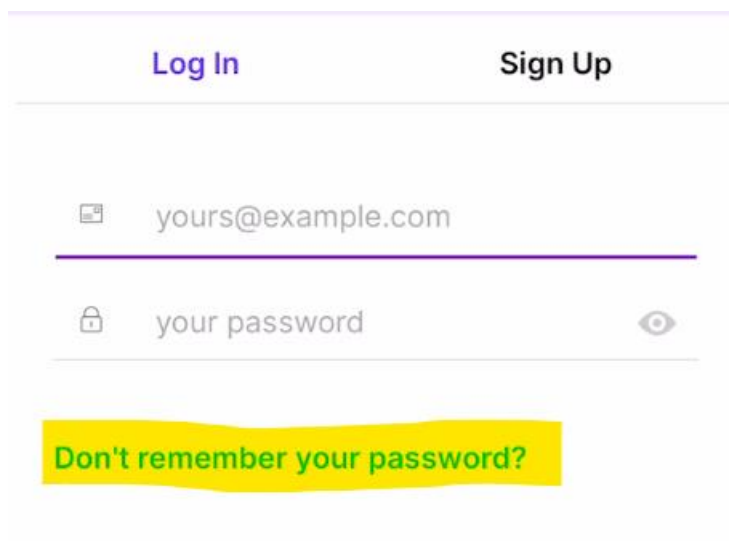


The screenshot shows the 'User Account Details' interface. The 'External Identity' field is highlighted in yellow and contains the email address 'loopymorgana@yopmail.com'. Other fields include 'Login Name' (Morgana), 'Display Name' (Robinson, Morgana (SigCNERobinson)), 'Authentication Type' (Both), and 'Expiry Date' (31/12/9999). There is also a 'Link to employee' checkbox checked and a 'Suspend Account' checkbox unchecked.

User Account Details	
Login Name *	Morgana
Display Name	Robinson, Morgana (SigCNERobinson)
Authentication Type	Both
Expiry Date *	31/12/9999
Link to employee	<input checked="" type="checkbox"/> Morgana Robinson (SigCNERobinson)
Email Address	loopymorgana@yopmail.com
External Identity	loopymorgana@yopmail.com
Suspend Account	<input type="checkbox"/>

How to help if a user can't remember their password on logging in to Loop

Loop password resets are now completely self managed by the user. If they have forgotten their password, there is an option on the **Log In** screen to reset their password.

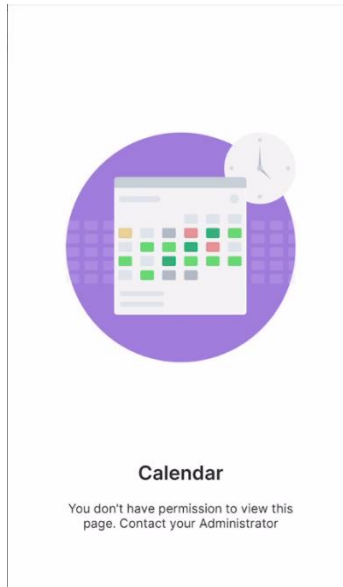


The screenshot shows the 'Log In' screen with fields for 'yours@example.com' and 'your password'. A yellow box highlights the link 'Don't remember your password?' at the bottom of the form.

Log In	Sign Up
<input type="text" value="yours@example.com"/>	
<input type="password" value="your password"/>	
Don't remember your password?	

Selecting this will send them an email to their Loop login email address to change their password.

What happens if I see a message that says I don't have the access to see my roster?



There are a few reasons for why you may be seeing the above screen when you are attempting to view your roster.

You have not got the correct feature accesses assigned

There are 3 Loop specific feature accesses you need to have assigned in order to see the rostering features on Loop.

1. **Services: Allocate Loop** – Without this assigned, you will see the above screen
2. **Services: Loop Rostering** – Without this assigned, you will see the roster screen, but no duties will appear on the screen
3. **Services: Ref Data** – Without this assigned, you will see the above screen

The External Identity field email doesn't match the email address they have signed up to Loop with

After a person has linked their email address to their Loop account and a change is then made to that email in the **External Identity** field in **Admin > User Accounts** to mean that that email address now doesn't match the Loop log in, the rostering won't show when they log in:

Example:

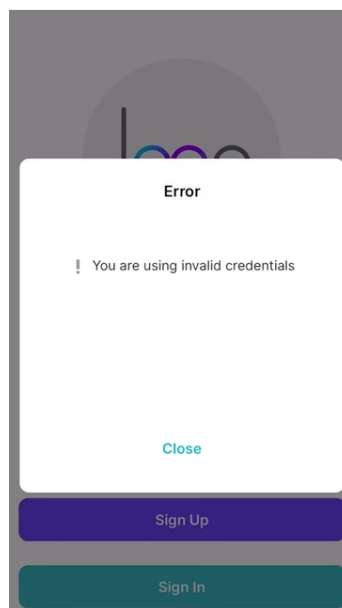
- Joe Bloggs signs up to Loop using the email address joe.bloggs@loop.com
- The **External Identity** field in **User Accounts** in HealthRoster is populated with the email joe.bloggs@loop.com
- Someone then changes the email address in the **External Identity** field in **User Accounts** in HealthRoster to j.o.e.bloggs@loop.com so that the email no longer matches the Loop log in
- The above screen will show in rostering and no rostering features will be available

To fix this, you just have to change the email address back to the correct one in the **External Identity** field. The user then just needs to log out of Loop and back in again and they will be able to see the rostering features in Loop.

A user account is no longer linked to an employee

If a user account is unlinked to an employee at any point after the Loop connection has been made they will see the above screen. To fix this, you just need to relink the account with the employee.

Seeing ‘! You are using invalid credentials’ when attempting to log in to Loop



This message will appear if a user is trying to log in to an account that they have previously deleted within the app. All users have the ability to delete a Loop user account within the app. This only deletes the Loop account and not the Optima account that you create for them.

The action is an irreversible one. There are a few messages during the process of deleting it that alerts the user to this. But essentially, if they delete the account, they are no longer able to use that email address again. The only way to access Loop is to create a new user account with a different email address.



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