

Solving Common Login Problems

Contents

Synopsis	3
Web Specific solutions	3
Platform Specific solutions	3
The Privia Profiler.....	3
Common Mistake #1: Incorrect “Log on to:”	4
Common Mistake #2: Incorrect “Server:”	4
Common Mistake #3: Incorrect “SSL”	4
Common Fix #1: Clearing passwords.....	4
Common Fix #2: Dealing with invalid SSL certificates	5
The Privia Web	6
Dealing with “Authentication Failed”: Fix 1	7
Dealing with “Authentication Failed”: Fix 2	8
Summary	8

Synopsis

Often the most difficult thing for a user to do when first using Privia is to get logged in. This is because the different clients have different methods for logging in and different ways of identifying information. This document will try to provide examples of how to properly log onto a Privia server with the various clients and dialogs and identify common problems that many users make.

Web Specific solutions

- 1) Username/login format should be “Log on to\Username”
- 2) Make sure that the URL in the browser is https://**SERVERNAME**/privia where **SERVERNAME** is from the invitation to join Privia

Platform Specific solutions

- 1) Username format should just be the “Username” from the invitation
- 2) Make sure that the “Log on to” field is set correctly
- 3) Make sure that the server name is correct
- 4) Make sure that SSL is checked

The Privia Profiler

The Privia Profile is a tool that not only captures the critical Privia information but it also sets up your .NET environment so that your client will be able to properly connect to the Privia server. When you run the Privia profiler, you must enter your information exactly as is shown in the email invitation. For example, enter the following into the Privia Profiler:

- User Name: PriviaUser
- Password: ***** (Appears blank if sent previously)
- Domain: Sales
- Server: sales.privia.com

Figure 1. Enter Information as it Appears in the Invitation

Privia Profiler - User Information

Press the Next button to register your client on Privia Server

User Name: PriviaUser

Password: *****

Domain: Sales

Server: sales.privia.com

☒ Fast HTTP ☐ I am behind proxy/firewall

☒ Secure (SSL) connection

When you are done click the Next button

< Back Next > Cancel

Common Mistake #1: Incorrect “Log on to:”

By far, the most common mistake that users make is to forget to enter the information in the “Log on to:” field in the profiler. In versions of Privia prior to version 4.4.2, this field was automatically filled with the name of the local computer or the local domain. But, in version 4.4.2 and later, this field is automatically left blank.

Regardless of the version of Privia that you are using, you should always overwrite the information in the “Log on to:” field with the information from the invitation.

Common Mistake #2: Incorrect “Server:”

While not nearly as common as forgetting the “Log on to” field, a very common mistake when users try to use Privia is not setting the “Server:” field correctly. Frequently this occurs when a user tries to use a Privia client from one environment for a different server. The Privia client always defaults the Server field to be the server that the client was downloaded from initially.

Always copy the information from the invitation email to the Server field on your profile.

Common Mistake #3: Incorrect “SSL”

Every server that is hosted by Privia LLC is configured to use SSL. Also, every customer that has connectivity to their Privia server outside of their local network also uses SSL. So, it is safest to always check the SSL box and if it fails try unchecking the SSL box. The Privia Profiler will automatically fall back to try the non-SSL connection if it cannot make a connection with SSL, but this may take 15 minutes or more and most users lack the patience to wait this long.

Common Fix #1: Clearing passwords

This is not a mistake by the end user. Rather, it is a result of using a common framework called .NET for the Privia clients. In the installed applications (Profiler, Platform Client, Enhanced Web), there is a checkbox beside “Remember my password.” Essentially, this little box that can be selected upon login will cache the password on the local computer. A problem occurs if the user changes their password on the system or they change their domain password for a server that is integrated with active directory.

What happens is that the client will try to send the cached password regardless of what is typed by the user and the authentication will fail. To try to overcome this issue, The Privia User Options tool allows you to clear the .NET framework cache and automatic login settings.

So, while troubleshooting logon issues, one thing to try is to clear this .NET cache. To do this, follow these steps:

- 1) Go to Start->Programs->Privia->Privia User Options
- 2) Click the two buttons at the bottom of the dialog (see below) for “Clear Automatic Logon Settings” and the button for “Clear Passwords”
- 3) Click the “OK” button to dismiss the dialog

Common Fix #2: Dealing with invalid SSL certificates

A few of our Privia customers use what are called “Self Signed Certificates”. These are SSL certificate that are generated by a local customer which are valid but they are not connected to a global registry and so your computer has no way to validate the certificate. As a result, the security on your computer will prevent your machine from connecting to this server.

The only way to connect to a server that is using a self-signed certificate is to disable the .NET framework from checking the certificates. To do this, go to:

Start->Settings->Control Panel->Internet Options. Click on the Advanced Tab and scroll down to the security section as shown in Figure 3.

Select the checkboxes beside “Check for publisher’s certificate revocation” and “Check for server certificate revocation”.

Now exit all running copies of internet explorer and try to log in.

Figure 2. Privia User Options

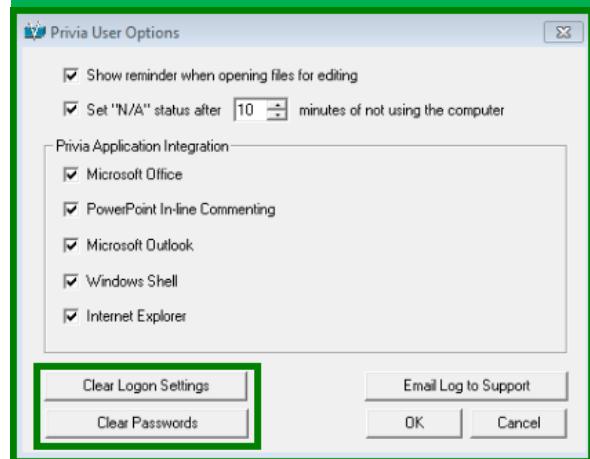
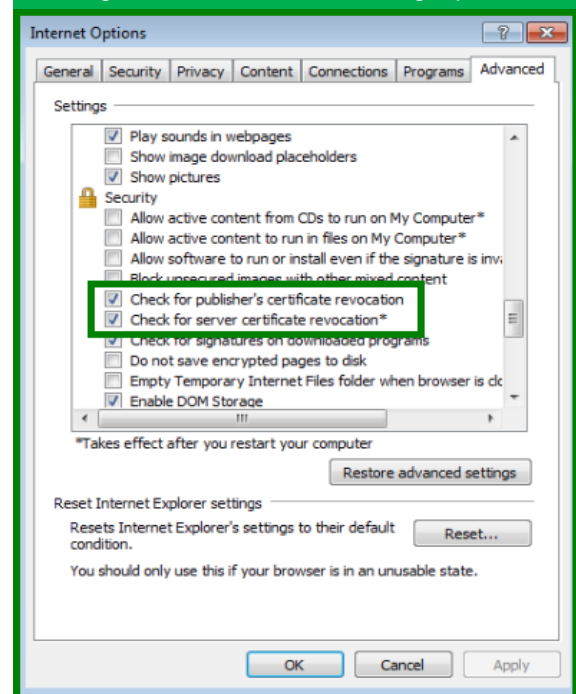


Figure 3. Select the Following Options



The Privia Web

The Privia Web client uses the Web browser to communicate directly with the Privia server and thus must conform to the Microsoft standard for usernames and passwords. The Microsoft convention for how a name is created is to prepend the domain (Log on to) information to the username. For example, with an invitation with the “Server” listed as “sales.privia.com”; with “Internet Explorer selected in the Privia User Options (see Figure 2), double-click on the Privia Web icon on the desktop.

Notice that the information from the “User” field is prepended to the “Username” information and a “\” character is used to separate the two. Enter the password and click “Ok” to login.

If using Firefox or Safari to connect to Privia Web (or when “Internet Explorer” is un-checked in Privia User Options), the authentication dialog will display as shown in Figure 5, this is Privia Pure Web). In the “User” field, enter the information as shown in the invitation to join Privia (note that the server name {juke} is listed before the username and has a ‘\’ character to separate the two, this only applies if the Privia server is on a domain, consult your Privia Administrator for further details if unclear). After entering the username, type the password and click “Ok”

Figure 4. Privia Enhanced Web Dialog

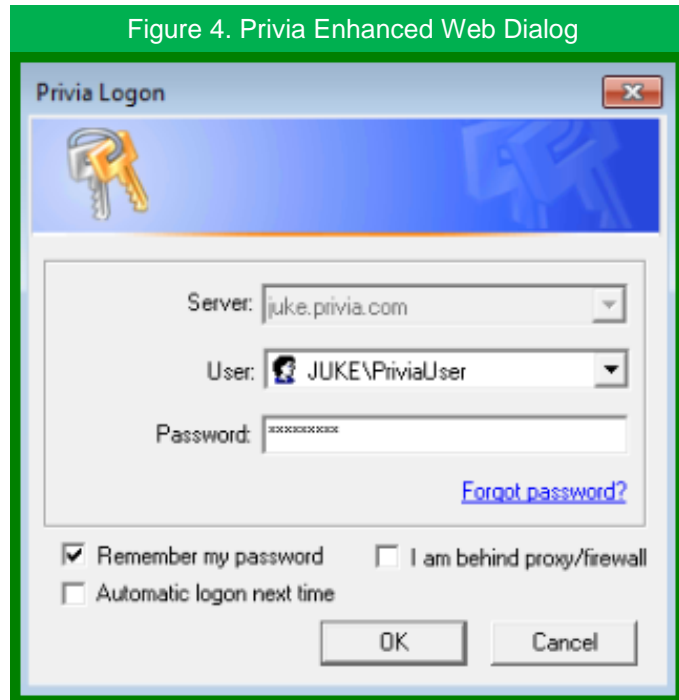


Figure 5. Privia Pure Web Dialog



Dealing with “Authentication Failed”: Fix 1

The most common error for users that are using the Privia Web interface (whether it is IE, Firefox, or Safari) is an authentication failed message due to a stuck cookie or stuck temporary information. To fix this, you must delete your cookies and clear the cache. Follow these steps:

- 1) Go to Start->Settings->Control Panel->Internet Options
- 2) On the General Tab, click on the “Delete...” button
- 3) Click on both the buttons for deleting the “Delete files...” and “Delete cookies...”
- 4) Choose the option at the bottom to “Close”
- 5) Select OK

Now try logging onto the Privia Web again to see if login is now possible.

Figure 6. Select the “Delete” Button

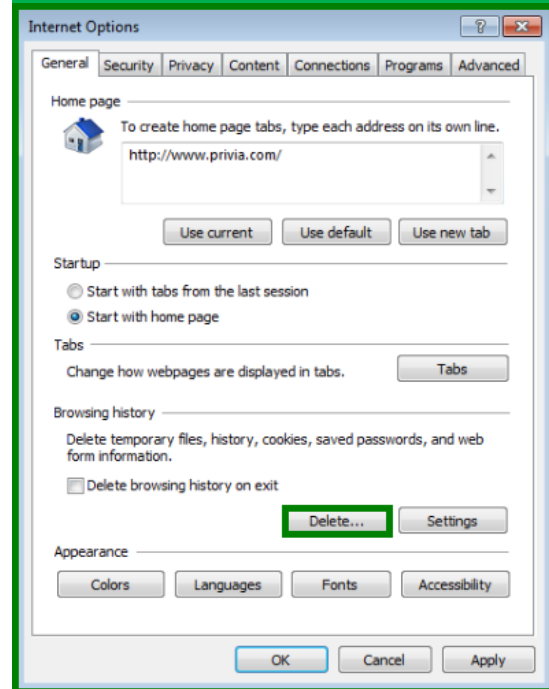
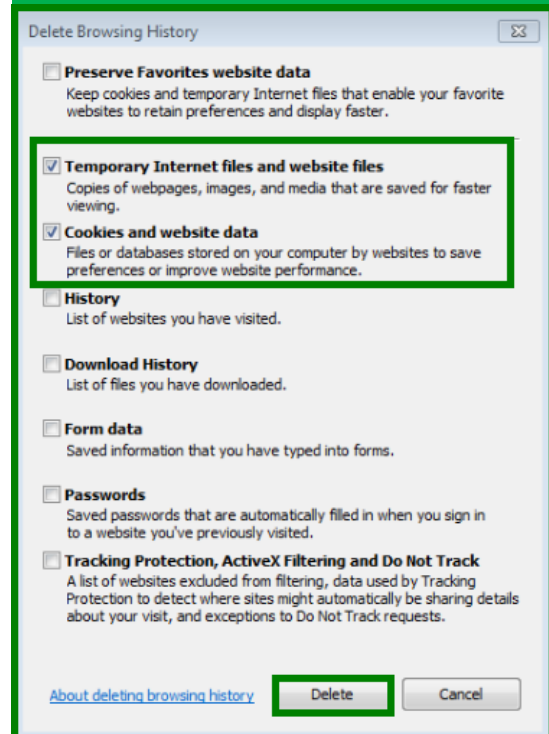


Figure 7. Check the Following Options



Dealing with “Authentication Failed”: Fix 2

Another common problem for using the Web interface is that if the computer is on an Active Directory domain, the computer will automatically pass the default credentials instead of what is typed into the “Password” field. To stop this from occurring, tell .NET to disable Integrated Authentication. Follow these steps to disable Integrated Authentication:

- 1) Go to Start->Settings->Control Panel->Internet Options
- 2) On the Advanced Tab, scroll down to the security section as shown in the following image:
- 3) Uncheck the box for “Enable Integrated Windows Authentication”
- 4) Click the OK button

Summary

Since Privia is using the .NET framework, all applications on the computer must conform to the security requirements of the .NET framework.

These setting changes will help you overcome and troubleshoot users having issues connecting to a Privia Server.

Figure 7. Select the Following Options

