MyID Enterprise

Version 12.13

MyID Client for Windows

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LocalizationResourceManager.Maui

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Conventions used in this document

- Lists:
  - Numbered lists are used to show the steps involved in completing a task when the order is important.
  - Bulleted lists are used when the order is unimportant or to show alternatives.
- **Bold** is used for menu items and for labels.

  For example:
  - Record a valid email address in **'From' email address**.
  - Select **Save** from the **File** menu.
- *Italic* is used for emphasis:

  For example:
  - Copy the file *before* starting the installation.
  - Do *not* remove the files before you have backed them up.
- ***Bold and italic*** hyperlinks are used to identify the titles of other documents.

  For example: "See the ***Release Notes*** for further information."

  Unless otherwise explicitly stated, all referenced documentation is available on the product installation media.
- A `fixed width` font is used where the identification of spaces is important, including filenames, example SQL queries and any entries made directly into configuration files or the database.
- **Notes** are used to provide further information, including any prerequisites or configuration additional to the standard specifications.

  For example:

  Note: This issue only occurs if updating from a previous version.
- Warnings are used to indicate where failure to follow a particular instruction may result in either loss of data or the need to manually configure elements of the system.

  For example:

  Warning: You must take a backup of your database before making any changes to it.

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1 Introduction

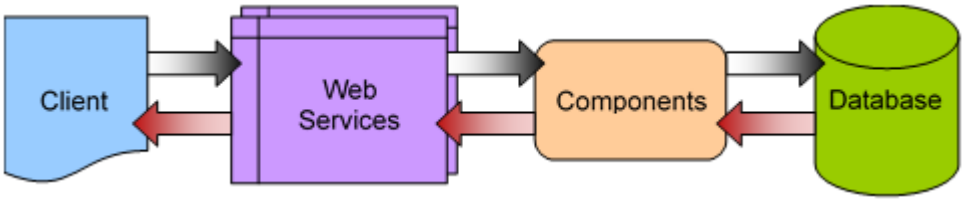
The MyID Client for Windows allows you to use your PC to carry out a wide variety of self-service operations.

You can:

- Change the PIN of your device.
- Change your security phrases.
- Reset your PIN.
- Update your device.
- Collect a device.
- Activate a device.
- Collect an update for your device.
- Collect a replacement device.
- Collect a certificate renewal.

You can also install an optional lightweight notifications application, the MyID Client Tray Service, which runs in the background and provides pop-up notifications when you have pending tasks.

1.1 Architecture



The MyID Client for Windows runs on your Windows PC computer and passes requests through HTTP or HTTPS to the MyID Data Source and MyID Process Driver web services. The web services communicate using DCOM with the MyID components on the application server; these components provide the business logic and communicate with the MyID database. Responses are returned to the client through the MyID web services.

The web services, components, and database may be on separate servers, or on the same server; the MyID Client for Windows needs only to be able to communicate with the web services server, whether over the internet or on your organization's network.

1.2 Differences between the MyID Client for Windows and MyID Client for Mac

The MyID Clients for Windows and Mac have substantially the same functionality, with the following differences:

- The MyID Client for Mac supports a limited range of devices. The MyID Client for Windows supports additional devices, including minidriver-based smart cards, Microsoft Virtual Smart Cards, and Windows Hello for Business.

  See the *Supported devices* section in the ***MyID Client for Mac*** guide.

- The MyID Client for Windows supports Integrated Windows Logon as an authentication method (for supported actions).

- By default, the MyID Client for Windows uses your current Windows user details rather than prompting for a username.

  In addition, if you manually provide a username that matches your user identifier, your SAM account name, or your UPN, the MyID Client for Windows provides all three identifiers to the server.

- You can use post-workflow triggered PowerShell scripts with the MyID Client for Windows; these are not available on the MyID Client for Mac.

  See the *Triggered scripts* section in the ***Administration Guide*** for details.

1.3 Differences between the MyID Client for Windows and the Self-Service App

The MyID Client for Windows supports most of the same functionality as SSA, with the following exceptions:

- The MyID Client for Windows does not currently support fingerprint capture or verification.
- The MyID Client for Windows does not support or produce exit codes.
- The MyID Client for Windows does not support automation mode. This feature is deprecated in the Self-Service App.
- The MyID Client for Windows does not support 2-way SSL (that is, the use of a client-side certificate).

  Standard 1-way SSL/TLS (server-side certificate) remains supported.
- The MyID Client for Windows does not currently provide a dedicated button to print Terms and Conditions; instead, you must right-click the Terms and Conditions then select the option to print.
- The following command-line arguments are not supported and produce an error:
  - `/err`
  - `/a`
  - `/hidewindow`
  - `/lp` and `/lw`
  - `/pw`
  - `/ssl` and `/sslsn`
  - `/vsconly`
  - `/processalljobs`
- The following command-line arguments are not supported, but do not produce an error:
  - `/?`, `/h`, and `/help`
  - `/nopopup`
  - `/hidenojobs`

2 Installing and uninstalling the MyID Client for Windows

This section provides instructions for installing and uninstalling the MyID Client for Windows.

See:

- System requirements for the MyID Client for Windows.

  See section *2.1*, *System requirements*.
- Install the MyID Client for Windows.

  See section *2.2*, *Installing the MyID Client for Windows*.
- Uninstall the MyID Client for Windows.

  See section *2.3*, *Uninstalling the MyID Client for Windows*.

2.1 System requirements

This section contains information about the required operating systems, .NET, Windows SDK, and MyID versions.

2.1.1 Supported client operating systems

The MyID Client for Windows supports the following client operating systems:

- Windows 10 version 22H2*.
- Windows 11 version 22H2*.

*Previous versions of the operating systems listed are expected to be compatible with MyID, with a minimum of Windows 10 May 2021 Update (21H1/10.0.19043). Earlier versions of Windows do not support the required version of the Microsoft App Installer used to install the MyID Client for Windows.

2.1.2 .NET Framework and .NET Core Desktop Runtime

The MyID Client for Windows requires both .NET Framework and the .NET Core Desktop Runtime.

See the *Installing .NET Framework and .NET Core* section in the ***Installation and Configuration Guide*** for details of the required versions.

2.1.3 Windows SDK

The MyID Client for Windows uses Windows App SDK 1.5. In most cases, Windows detects this prerequisite as part of running the installation and installs the relevant Windows App SDK from the Microsoft Store automatically as required.

However, in some scenarios, this may not be possible (for example, in an offline environment). In these cases, you may receive an error similar to the following when attempting to install:

```
add-appxpackage : Deployment failed with HRESULT: 0x80073CF3, Package
failed updates, dependency or conflict validation.

Windows cannot install package 467b7619-c6b6-4dd7-8624-8ce722184569_
3.1.0.67_x64__1yr1geg1kr9qe because this package depends on a framework
that could not be found. Provide the framework
"Microsoft.WindowsAppRuntime.1.5" published by "CN=Microsoft Corporation,
O=Microsoft Corporation, L=Redmond, S=Washington, C=US", with neutral or
x64 processor architecture and minimum version 5001.214.1843.0, along with
this package to install.
```

In this scenario, you must install Windows App SDK 1.5 manually using the latest x64 installer available from Microsoft:

learn.microsoft.com/en-us/windows/apps/windows-app-sdk/downloads-archive#windows-app-sdk-15

2.1.4 Supported MyID versions

The MyID Client for Windows requires the following:

- MyID CMS 12.4.0 or later.

Note: If you are not using the most recent version of MyID CMS, you may need to change some configuration options:

- If you are using a version of MyID CMS earlier than 12.11, you must set the `UseLegacySsaPlatform` configuration option to `true` to allow the MyID Client for Windows to impersonate the Self-Service App and be recognized by the server.
- If you are using a version of MyID CMS earlier than 12.12, you must set the `UseLegacyPassphraseCollection` configuration option to `true` allow the MyID Client for Windows to use the old web-service endpoint; if you set this configuration option, support for authentication using external identity providers is disabled.

For information on setting configuration options, see section *7.1.6*, *Setting advanced options*.

Note: The optional MyID Client Tray Service requires MyID CMS 12.12 or later.

2.2 Installing the MyID Client for Windows

The MyID Client for Windows and the MyID Client Tray Service are provided in MSIX installation programs.

Note: You are recommended to keep the versions of the MyID Client for Windows and the MyID Client Tray Service the same to ensure compatibility.

MSIX installation programs have the following features:

- Applications installed from an MSIX are installed into a lightweight AppContainer, which isolates it from the rest of the system; the application's files are locked-down and inaccessible, and parts of the system, such as the registry, are virtualized inside the container. This provides both security and reliability.
- MSIX applications are installed for each user. If a second user installs the application, Windows reuses the original files for the second user rather than duplicating them.
- MSIX applications are optimized for installation over a network; when updating an MSIX package from a network location, only the changes from the updated MSIX are copied to the local machine.

For more information about MSIX installation, see:

- ***learn.microsoft.com/en-us/windows/msix/overview***
- ***learn.microsoft.com/en-us/windows/msix/desktop/managing-your-msix-deployment-enterprise***

2.2.1 Installing the client software interactively

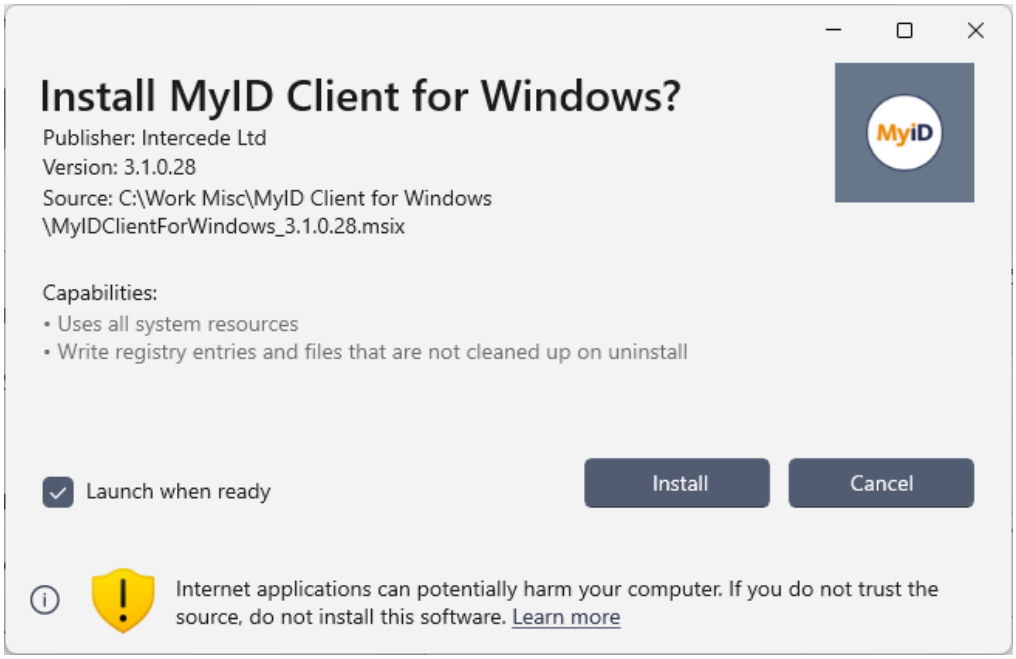
To install the MyID Client for Windows or the MyID Client Tray Service:

1. Double-click the `.msix` file.

   The installation programs are provided in the following folder in the installation image:

   `\MyID Clients\MyID Client for Windows\`

   The installation program opens.



2. If you want to launch the software immediately once it has been installed, make sure that **Launch when ready** is selected.
3. Click **Install**.

Note: You cannot customize the installation or provide server details in the installation program. If your organization wants to configure the software for end users, you can distribute an administrator configuration file; see section *7.2*, *Setting up an administrator configuration override file*.

2.2.1.1 Listed capabilities

The capabilities listed for the MyID Client for Windows are:

- **Uses all system resources**

  The MyID Client for Windows is a Medium IL (integrity level) or full trust app. To allow this from an MSIX installation requires the `runFullTrust` MSIX capability.

- **Write registry entries and files that are not cleaned up on uninstall**

  The MyID Client for Windows disables virtualization for the `%LocalAppData%\Intercede\MyID Client\` folder, which allows it to write user configuration and log files outside of the MSIX container. This also allows the MyID Client Tray Service to share configuration settings with the MyID Client for Windows. Note that files written to this folder are not removed on uninstall.

2.2.2 Installing the client software silently

You can use Windows PowerShell to carry out a silent install. At the Windows PowerShell prompt, run the following command:

```
Add-AppxPackage "<path>\MyIDClientForWindows_<version>.msix"
```

where:

- `<path>` – the path where the `.msix` file is located.
- `<version>` – the version of the client software.

This runs the installation silently, and installs the software for the current user.

For example:

```
Add-AppxPackage "C:\Software\MyIDClientForWindows_3.1.0.99.msix"
```

2.2.3 Installing the client software for all users

You can provision MSIX packages to a Windows image; either to an image that you intend to deploy to PCs, or to a live image that is currently running on a PC. The software is then available to any new users who log on to the PC.

To provision an MSIX, run the following Windows PowerShell command:

```
Add-AppxProvisionedPackage -Online -PackagePath
"<path>\MyIDClientForWindows_<version>.msix"
```

where:

- `<path>` – the path where the `.msix` file is located.
- `<version>` – the version of the client software.

For example:

```
Add-AppxProvisionedPackage -Online -PackagePath
"C:\Software\MyIDClientForWindows_3.1.0.99.msix"
```

2.2.4 Managing deployments using App Installer files

Microsoft provides a feature that allows you to manage deployments with an App Installer file. This allows you to control the versions being deployed from a central location (for example. an App Installer file on a network drive) even when copied locally, as the local App Installer file is aware of and will refer to the original file on the network. You can also use your AppInstaller file to configure automatic updates.

For more information, see:

learn.microsoft.com/en-us/windows/msix/app-installer/app-installer-file-overview

2.2.5 Troubleshooting installation

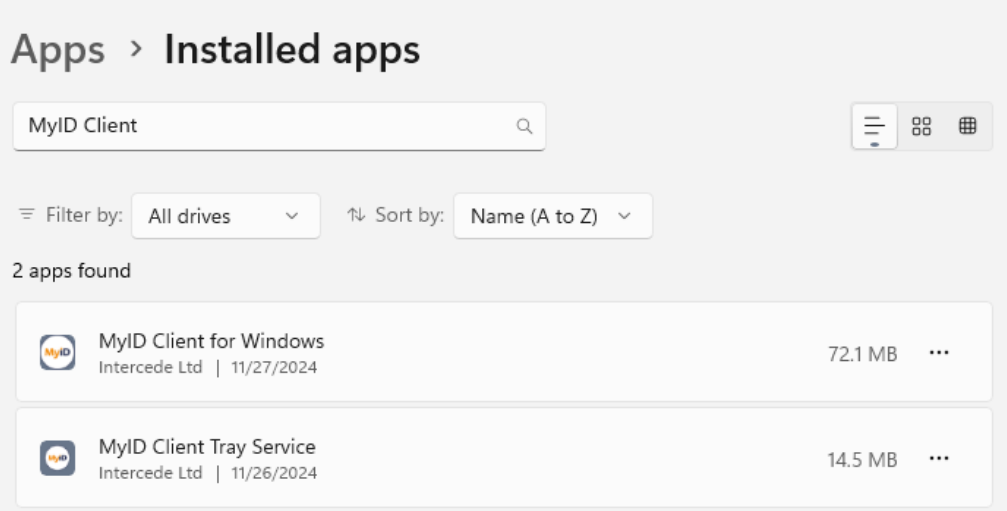
Windows provides logs that you can consult if there is an issue with MSIX deployment. You can find these logs in the Windows Event Viewer in the following locations:

- Applications and Services Logs > Microsoft > Windows
  - AppXDeployment
  - AppXDeployment-Server
  - AppXDeployment-Server-UndockedDeh
  - AppXPackagingOM

2.3 Uninstalling the MyID Client for Windows

To uninstall the MyID Client for Windows or the MyID Client Tray Service:

1. In Windows Settings, select **Apps > Installed apps**.
2. Use the search option to locate the app you want to uninstall:
   - **MyID Client for Windows**
   - **MyID Client Tray Service**



3. Click the **...** option, then from the pop-up menu select **Uninstall**.
4. On the confirmation prompt, click **Uninstall**.

   The app is uninstalled.

Note: Uninstalling the app does not remove the configuration files. To remove the app completely, you can delete the configuration file.

The user configuration file is:

```
%LocalAppData%\Intercede\MyID Client\MyIDClientConfig.xml
```

and the administrator configuration override file is:

```
%ProgramData%\Intercede\MyID Client\MyIDClientConfig.xml
```

See section *7.2*, *Setting up an administrator configuration override file* for details of administrator configuration override files.

2.3.1 Uninstalling the client software silently

You can use Windows PowerShell to carry out a silent uninstall. At the Windows PowerShell prompt, run the following command:

```
Remove-AppxPackage "<full name>"
```

where:

- `<full name>` – the full name of the package.

  You can find the full name of the package by running the following PowerShell command:

  ```
  Get-AppxPackage -Publisher "CN=Intercede Ltd, O=Intercede Ltd,
  L=Lutterworth, C=GB"
  ```

  The full name is listed under `PackageFullName`.

This removes the software silently for the current user. To remove the software for all users, add the `-AllUsers` parameter; note that this requires administrative permissions.

For example:

```
Add-AppxPackage "36350e02-7659-46ba-b5fa-dcd8ace3abff_3.1.0.43_x64__
1yr1geg1kr9qe"
```

```
Remove-AppxPackage -AllUsers "36350e02-7659-46ba-b5fa-dcd8ace3abff_
3.1.0.43_x64__1yr1geg1kr9qe"
```

3 Configuring MyID CMS for the MyID Client for Windows

You control access to the actions and tasks available in the MyID Client for Windows by setting up your roles in MyID.

Note: This uses the same configuration as the Self-Service App. If you have already set up your MyID server for the Self-Service App, no additional configuration is required.

You can:

- Control access to self-service actions .

  See section *3.1*, *Configuring access to actions*.
- Set up access for self-service device updates.

  See section *3.2*, *Setting up self-service device update*.
- Control access to update tasks.

  See section *3.3*, *Configuring access to tasks*.

3.1 Configuring access to actions

Each person who wants to use the MyID Client for Windows must be assigned a role that provides the appropriate workflow that corresponds to the action; in addition, you must configure the built-in system role **Default SSA User** with the same permissions. This is because the MyID Client for Windows displays the list of actions before the person has authenticated themselves to the MyID server.

- **Change My PIN** – requires access to the **Change PIN** workflow in **Edit Roles**.
- **Change My Security Phrases** – requires access to the **Change My Security Phrases** workflow in **Edit Roles**.
- **Reset My PIN** – requires access to the **Unlock My Card** workflow in **Edit Roles**.
- **Update My Device** – requires access to the **Update My Device** (for both the Default SSA User role and the person's role) and **Collect My Updates** (for the person's role only) workflows in **Edit Roles**.

  Note: Self-service device update requires additional configuration, as it may not be suitable for all organizations. This configuration also determines what sort of device update is available; you may be able to update your device to the latest credential profile, or you may be able to reprovision your device completely. See section *3.2*, *Setting up self-service device update* for details.

3.2 Setting up self-service device update

For self-service device update, in addition to the role configuration (see section *3.1*, *Configuring access to actions*), you must also configure MyID with a mapping file that details how the self-service device update is carried out.

To configure the external system for the self-service device update feature:

1. In MyID Desktop, from the **Configuration** category, select **External Systems**.
2. Click **New**.
3. From the **Listener Type** drop-down list, select **UserSync**.

   The configuration details for the self-service device update feature appear.
4. Type a **Name** and **Description** for the external system.
5. From the **Mapping File** drop-down list, select one of the following:
   - **UserSync_UpdateCardToLatest** – all self-service updates through the **Update My Device** option in the MyID Client for Windows carry out an update of the device to the latest version of the credential profile.
   - **UserSync_ReprovisionCard** – all self-service updates through the **Update My Device** option in the MyID Client for Windows carry out a full reprovision of the device.

   The mapping file contents are displayed in the Contents pane.
6. Click **Save**.

3.3 Configuring access to tasks

When you have a task available, it appears in your **Tasks** list. When you select the task and authenticate to the MyID server, the MyID Client for Windows checks that you have access to the appropriate workflow.

- Collecting a device – requires access to the **Collect My Card** workflow in **Edit Roles**.
- Activating a device – requires access to the **Activate Card** workflow in **Edit Roles**.
- Collecting an update for a device – requires access to the **Collect My Updates** workflow in **Edit Roles**.

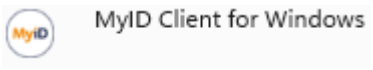
  Note: This task requires a card that has been issued with MyID Logon capabilities; you must also be permitted to log on with a smart card.
- Collecting a replacement device – requires access to the **Collect My Card** workflow in **Edit Roles**.
- Collecting a certificate renewal – requires access to the **Collect My Certificates** workflow in **Edit Roles**.

  Note: This task requires a card that has been issued with MyID Logon capabilities; you must also be permitted to log on with a smart card.

4 Launching the MyID Client for Windows

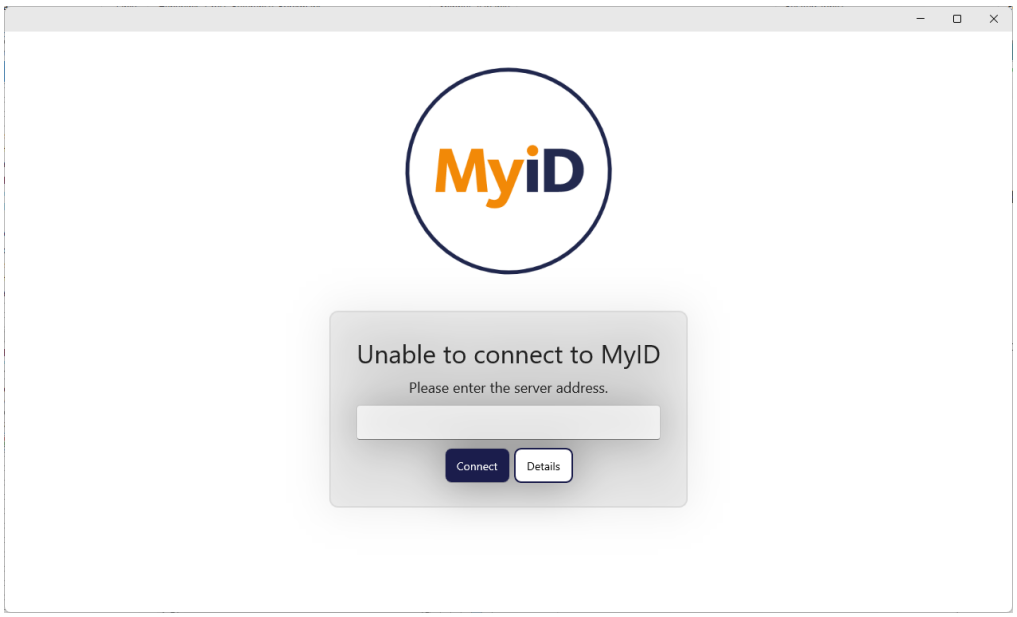
To launch the MyID Client for Windows:

1. From the Windows Start menu, select **All apps**.
2. Click the MyID Client for Windows icon:

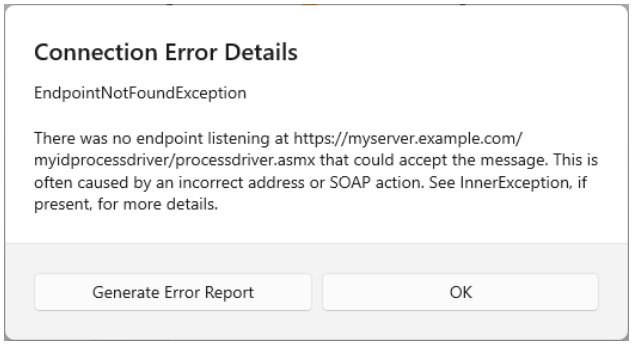


3. The MyID Client for Windows opens.

   The first time you launch the MyID Client for Windows, it is unable to connect to the MyID CMS server, as you have not yet provided the server's location.



   If you have already provided the location of the MyID CMS server, but the MyID Client for Windows cannot connect, you can click the **Details** button to provide further information, and optionally generate an error report to help diagnose the issue:

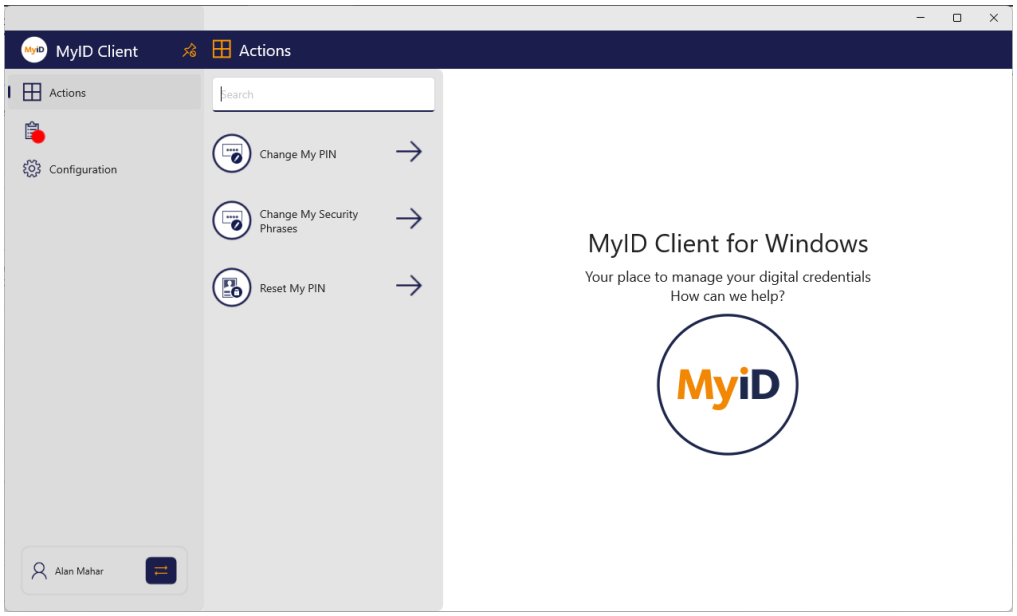


4. Type the URL of the MyID CMS server; for example:

   `https://myid.example.com/`

   Note: You must start the server address with `https://`
5. Click **Connect**.

The MyID Client for Windows connects to the server.



Note: By default, the MyID Client for Windows uses your current Windows user details rather than prompting for a username. If you want to change the username, see section *4.1*, *Switching users*.

You can also launch the MyID Client for Windows in the following ways:

- From the MyID Client Tray Service.

  If you have outstanding tasks, you can launch the MyID Client for Windows from a notification; see section *4.2*, *Launching the MyID Client for Windows from the MyID Client Tray Service*.

- From the MyID Operator Client.

  You can launch the MyID Client for Windows from the self-service menu in the MyID Operator Client; see section *4.3*, *Launching the MyID Client for Windows from the MyID Operator Client*.

- From the command line.

  You can launch the MyID Client for Windows from the command line. This allows you to specify command-line arguments. See section *4.4*, *Launching the MyID Client for Windows from the command line*.

- From a hyperlink.

  For example, from an email notification, from an Intranet web page, or from the Self-Service Request Portal. For information about configuring hyperlinks, see section *4.5*, *Launching the MyID Client for Windows from a hyperlink*.

4.1 Switching users

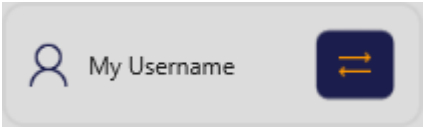
By default, the MyID Client for Windows uses your current Windows user details rather than prompting for a username.

You can switch to a different user account if required.

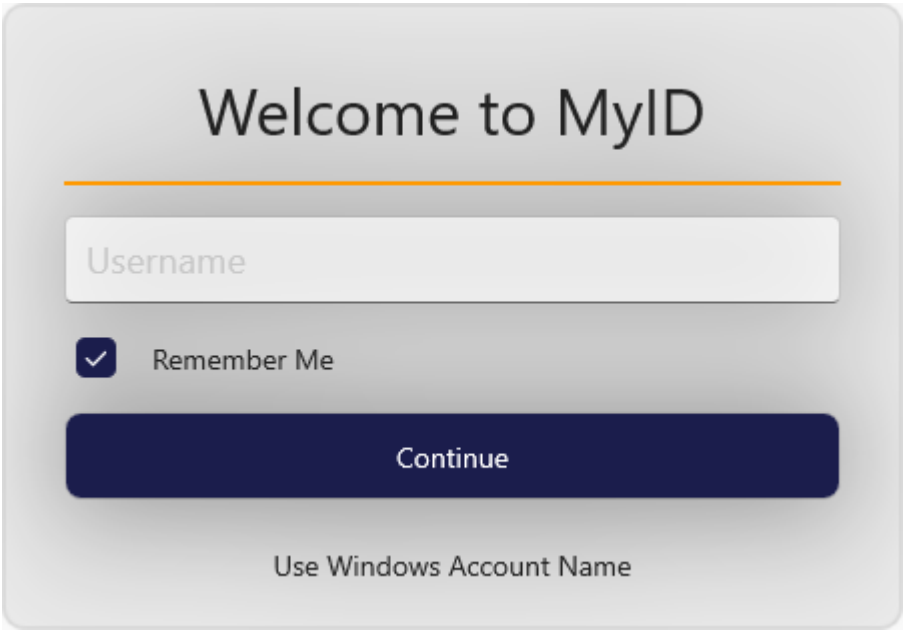
Note: If your administrator has configured your MyID Client for Windows with a username and specified that the user cannot override this value, you cannot switch user accounts.

To switch to a different user account:

1. Click the **Switch User** button.



The Welcome to MyID screen appears.



2. Type your username.

   If you want the MyID Client for Windows to detect your Windows account name, click the **Use Windows Account Name** link.

   Note: If you provide a username that matches your Windows user identifier, your SAM account name, or your UPN, the MyID Client for Windows provides all three identifiers to the server.

3. Optionally, select the **Remember Me** option to remember your username so you do not have to type it again when you launch the MyID Client for Windows. If you do not set this option, the MyID Client for Windows uses your Windows user details instead.

4.2 Launching the MyID Client for Windows from the MyID Client Tray Service

When you install the MyID Client Tray Service, it starts automatically when you log on to Windows and runs in the background to check periodically for new tasks on the MyID server.

Note: The MyID Client Tray Service requires MyID 12.12 or later, and will not operate if you set the `UseLegacySsaPlatform` configuration option.

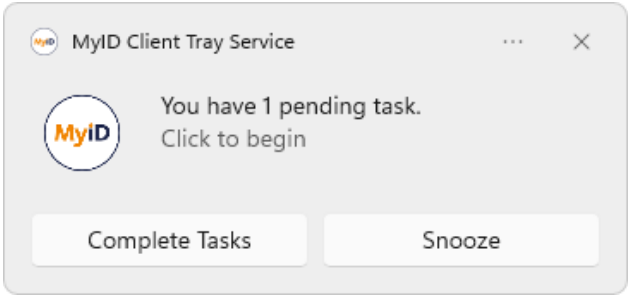
If the MyID Client Tray Service cannot connect to the MyID server, it displays a yellow badge on its icon:

The MyID Client Tray Service uses the server details and other configuration settings from the MyID Client for Windows. If the MyID Client Tray Service cannot connect to the server, use the MyID Client for Windows to set the server details, then restart the MyID Client Tray Service.

Note: If the MyID Client for Windows is not open when you launch it from the MyID Client Tray Service, it opens, allows you to carry out the operation relating to the notification, then closes. If the MyID Client for Windows is already open, it allows you to carry out the operation relating to the notification, then remains open.

4.2.1 Launching the MyID Client for Windows from a notification

When a task is available for you, the MyID Client Tray Service pops up a Windows notification.

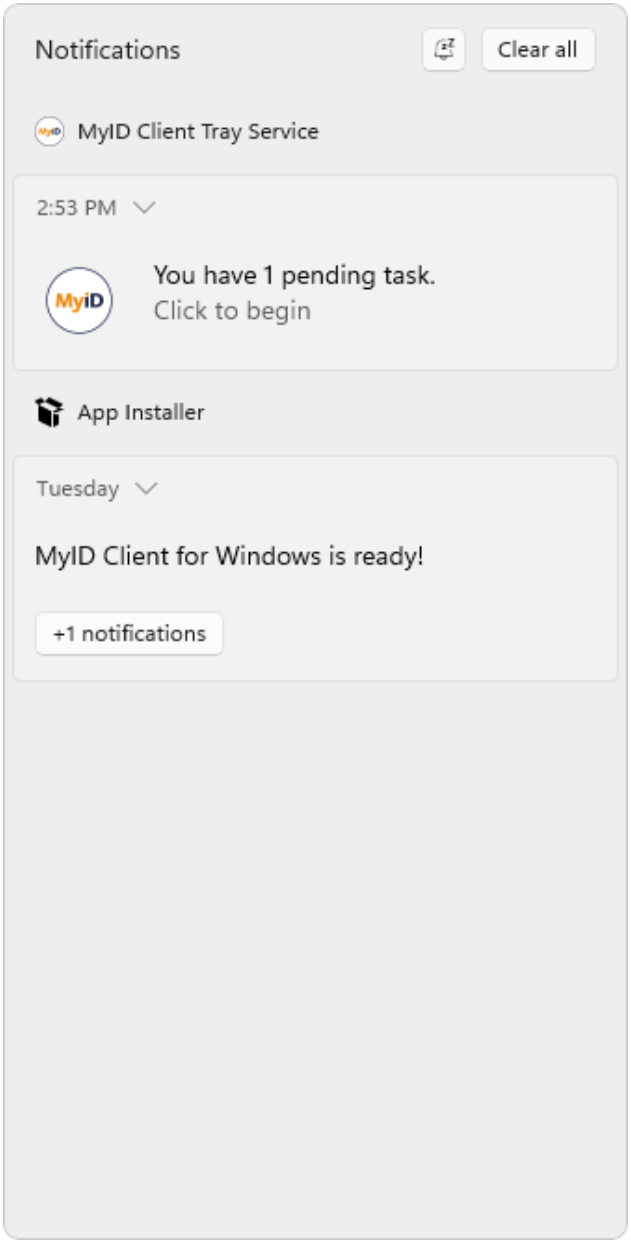


Click the notification to open the MyID Client for Windows and start the first available task.

Note: If you set the **Do not disturb** setting in the **System > Notifications** settings in Windows., notifications do not pop up, but are sent directly to the Windows notification center.

If you do not see the pop-up notification, the MyID Client Tray Service icon displays a red notification badge:

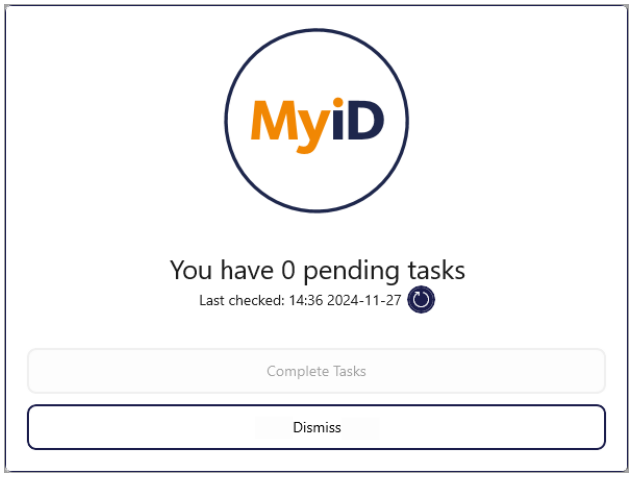
You can also access the notifications from the Windows notification center.



4.2.2 Checking for updates

The MyID Client Tray Service automatically checks for available tasks periodically. You can force the MyID Client Tray Service to check immediately:

1. Click the MyID Tray Service icon in the system tray.

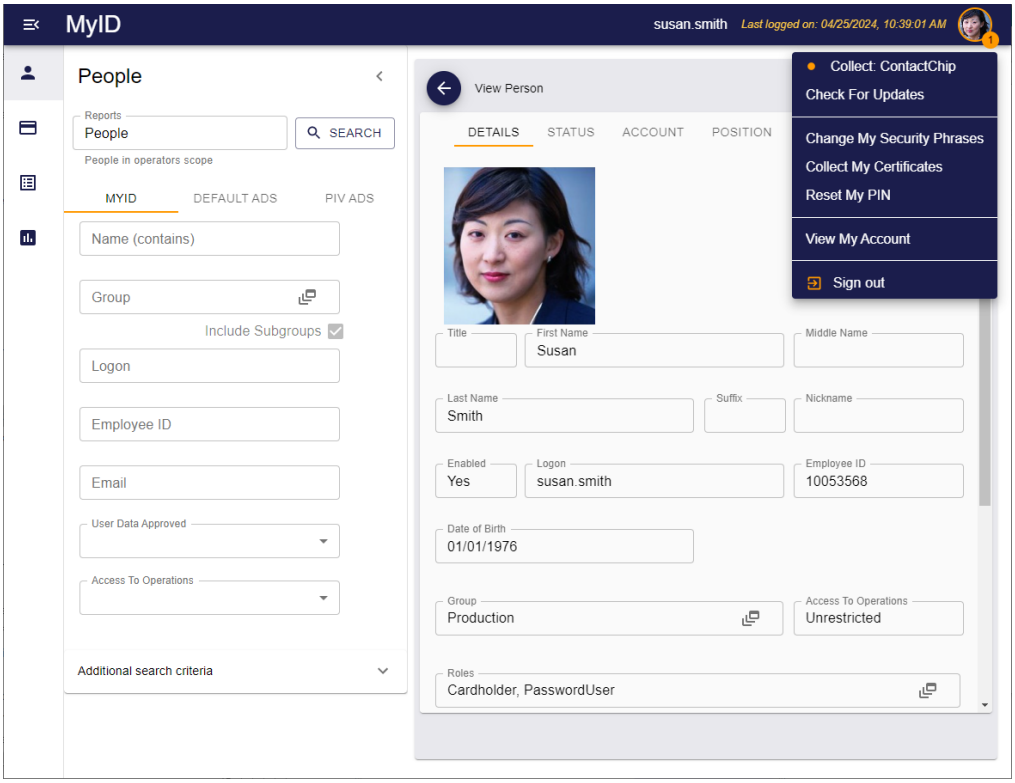


2. Click the Refresh button .

   The MyID Client Tray Service checks the MyID server for any available tasks.

4.3 Launching the MyID Client for Windows from the MyID Operator Client

The self-service menu in the MyID Operator Client provides links to tasks and self-service actions.



You can launch the MyID Client for Windows to collect self-service requests or carry out self-service actions from this menu.

See the *Carrying out self-service operations* and *Launching MyID Desktop, Self-Service App, or MyID Client for Windows workflows* sections in the ***MyID Operator Client*** guide for details.

4.4 Launching the MyID Client for Windows from the command line

To run the MyID Client for Windows from the command line, use the alias:

```
MyIDClient
```

or:

```
MyIDClient.exe
```

You do not have to specify a path.

4.4.1 Command line reference

You can use the following options on the command line:

- `/un:<value>` – The username to use. If the username has spaces, enclose the name in quotes; for example:

  ```
  MyIDApp /un:"My Name"
  ```

- `/jobid:<value>` – Launch a task by its MyID job ID. You can specify only one task.
- `/opid:<value>` – Launch an action by its MyID operation ID. You can currently use one of the following IDs:
  - `110` – **Change My Security Phrases**
  - `255` – **Reset My PIN**
  - `202` – **Change My PIN**
  - `5013` – **Update My Device**
- `/w` – Starts the MyID Client for Windows in wizard mode. Wizard mode launches the MyID Client for Windows, allows you to complete one operation, then closes.

  You can specify a `jobid` or an `opid` for the operation and the MyID Client for Windows carries out that task or action, then closes.

  If you specify the `/w` parameter, but do not specify an `opid` for an action or a `jobid` for a task, the MyID Client for Windows opens, carries out the first available task for the specified user, then, once they have completed that task, closes the client.
- `/hidecancel` (wizard mode only) – Removes the **Cancel** button from any page that displays it. This allows you to prevent users from canceling operations.

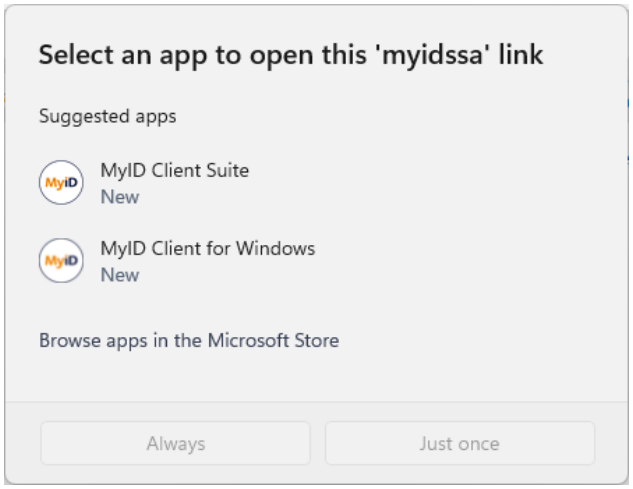
4.5 Launching the MyID Client for Windows from a hyperlink

When you install the MyID Client for Windows, it registers the following protocols:

- `myidssa://`

  This protocol is provided for backwards compatibility with the MyID Self-Service App. Existing links that you may have configured for the Self-Service App are handled by the MyID Client for Windows.

  Note: If you have both the MyID Client for Windows and the Self-Service App installed, you are prompted to select which one to use.



- `myidclient://`

  This protocol behaves in the same way as the `myidssa://` protocol, but opens only the MyID Client for Windows, and not the Self-Service App; you can use this protocol to make sure that your end users are using the MyID Client for Windows.

These registered protocols allow you to click on hyperlinks on web pages and email messages to launch the MyID Client for Windows. This allows you to create tailored email notifications from within MyID; for example, to send to a user when there is a new security device to collect.

You can use the following parameters:

- `/un:username`

  Allows you to specify the username for the person.

  For example:

  ```
  <a href="myidssa:///un:susan.smith">
  ```

- `/jobid:task`

  Allows you to specify the ID of the task you want to collect. You can use the `%jobid%` substitution code in the email template to provide the appropriate ID.

  For example:

  ```
  <a href="myidssa:///un:susan.smith+/jobid:%jobid">
  ```

- `/opid:action`

  Allows you to specify an action to carry out. You can use the following codes:

  - `110` – **Change My Security Phrases**
  - `255` – **Reset My PIN**
  - `202` – **Change My PIN**
  - `5013` – **Update My Device**

  For example:

  ```
  <p><a href="myidssa:///un:susan.smith+/opid:110">Change My Security Phrases</a></p>
  ```

  ```
  <p><a href="myidssa:///un:susan.smith+/opid:255">Reset My PIN</a></p>
  ```

  ```
  <p><a href="myidssa:///opid:202+/un:susan.smith">Change My PIN</a></p>
  ```

  ```
  <p><a href="myidssa:///opid:5013+/un:susan.smith">Update My Device</a></p>
  ```

- `/w`

  Closes the MyID Client for Windows at the end of the operation.

  For example:

  ```
  <a href="myidssa:///w+/un:susan.smith+/opid:110">Change My Security Phrases</a>
  ```

  This opens the MyID Client for Windows for the user Susan Smith, prompts them to change their security phrases and, once they have completed that operation, closes the client.

  If you specify the `/w` parameter, but do not specify an `opid` for an action or a `jobid` for a task, the MyID Client for Windows opens, carries out the first available task for the specified user, then, once they have completed that task, closes the client.

Note: You *must* include the username in hyperlinks to launch the MyID Client for Windows.

You can use the parameters in any order.

To make sure that usernames with spaces are dealt with correctly, you must replace the spaces with + signs. For URLs created from email templates, MyID can do this automatically if you use the correct syntax.

For example, if your email template includes the following:

```
Click <a href="myidssa:///jobid:%jobid+/un:{%logonName:URI}">Collect</a>.
```

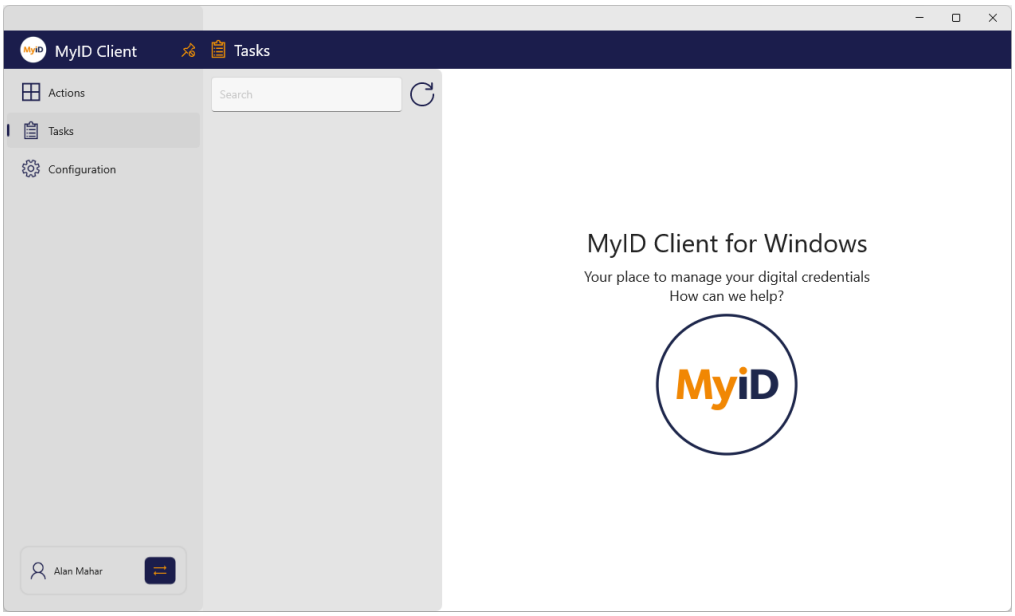
when the email message is created, it becomes HTML similar to:

```
Click <a href="myidssa:///jobid:256+/un:Jane+Smith">Collect</a>.
```

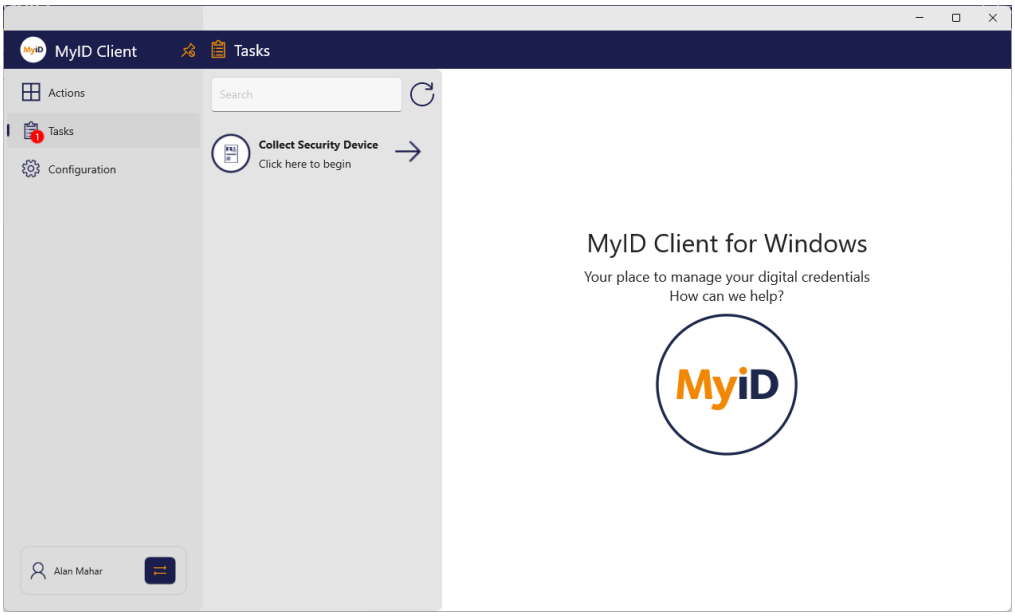
5 Checking for device tasks

The MyID Client for Windows allows you to carry out a variety of device tasks. Unlike Actions, where you instigate the procedure yourself, Tasks are made available for you by operators; for example, an operator may request a device for you, and a Task appears in your list informing you that you can collect it. Some tasks may be automatic; for example, if your certificates are nearing their expiry date, the MyID system may generate a certificate renewal task for you.

Click the **Tasks** option, and the list of available tasks appears. The list of tasks is refreshed periodically; click the refresh icon to check the MyID server immediately for any available tasks.



If there are available tasks, a badge appears on the **Tasks** link showing the number of tasks.



You can use the **Search** box to search for a particular task.

You can carry out the following types of task:

- Device collection.

  See section *5.1*, *Collecting a device*.
- Device activation.

  See section *5.2*, *Activating a device*.
- Device update.

  See section *5.3*, *Collecting an update for a device*.
- Device replacement.

  See section *5.4*, *Collecting a replacement device*.
- Certificate renewal.

  See section *5.5*, *Collecting a certificate renewal*.

5.1 Collecting a device

You can use the MyID Client for Windows to collect a device that has been requested for you.

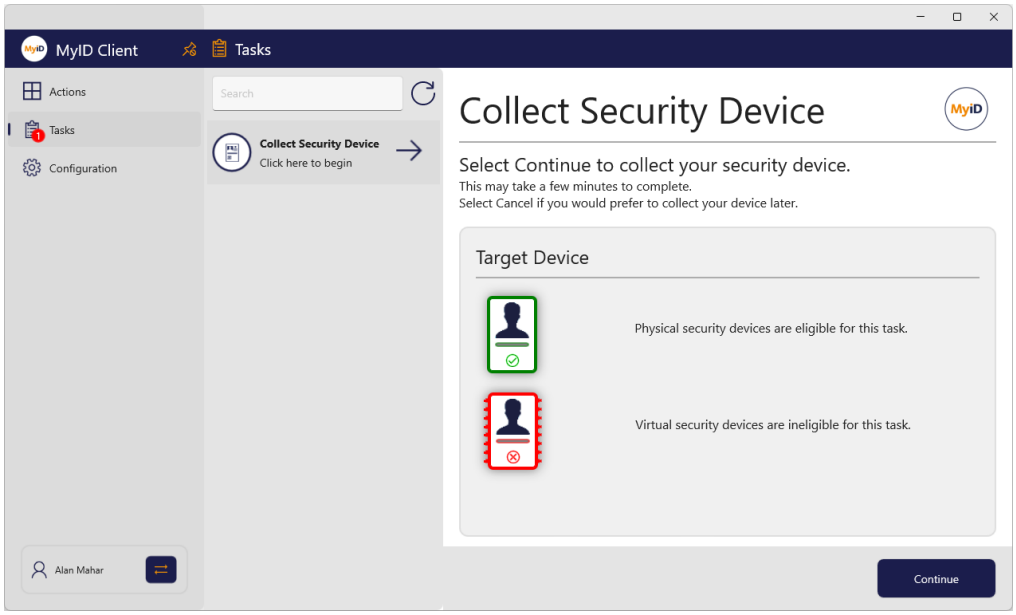
Using this task requires access to the **Collect My Card** workflow in **Edit Roles**.

To collect a device:

1. Click the **Tasks** option.
2. Click the **Collect Security Device** task in the list.

   The MyID Client for Windows displays information about the target device that is required for this task.

   For example, you may have to use a specific device, or you may be able to use any physical device (smart card or USB token) that is supported.



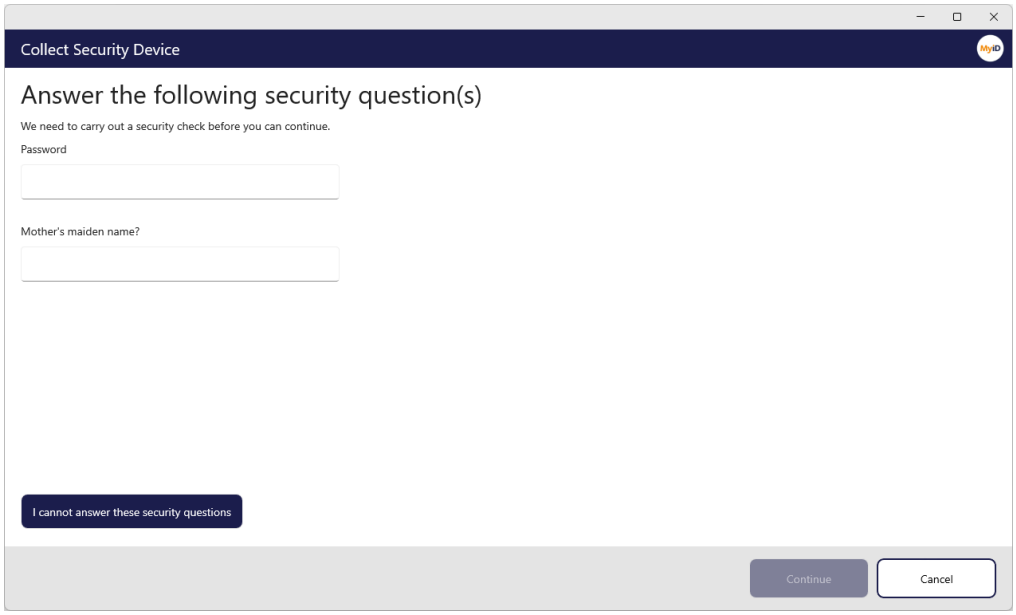
3. Click **Continue**.

   You must now provide your authentication details to the MyID Client for Windows.

   You must have permission to authenticate using security phrases or an external identity provider.

   Note: The order of these authentication methods is determined by the **Logon Priority** tab in the **Security Settings** workflow in MyID Desktop. You cannot use an external identity provider if the credential profile for the device being collected requires activation.

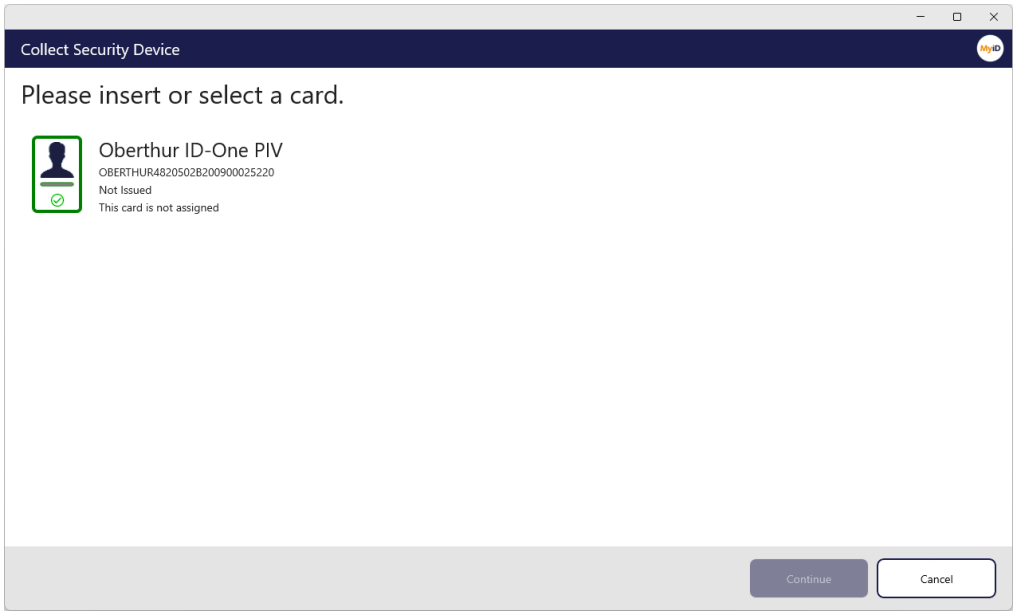
   For details of using external identity providers, see the *Setting up an external identity provider* section in the ***MyID Authentication Guide***.



4. Provide your authentication details then click **Continue**.

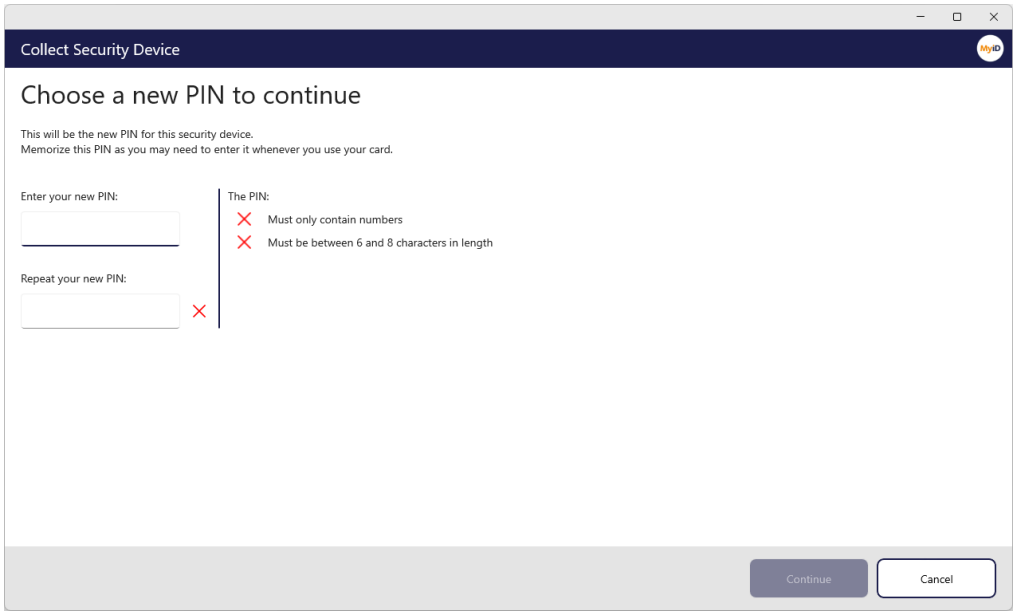
   The MyID Client for Windows checks for attached devices.

5. Insert your smart card into a card reader, or your USB token into the USB port.



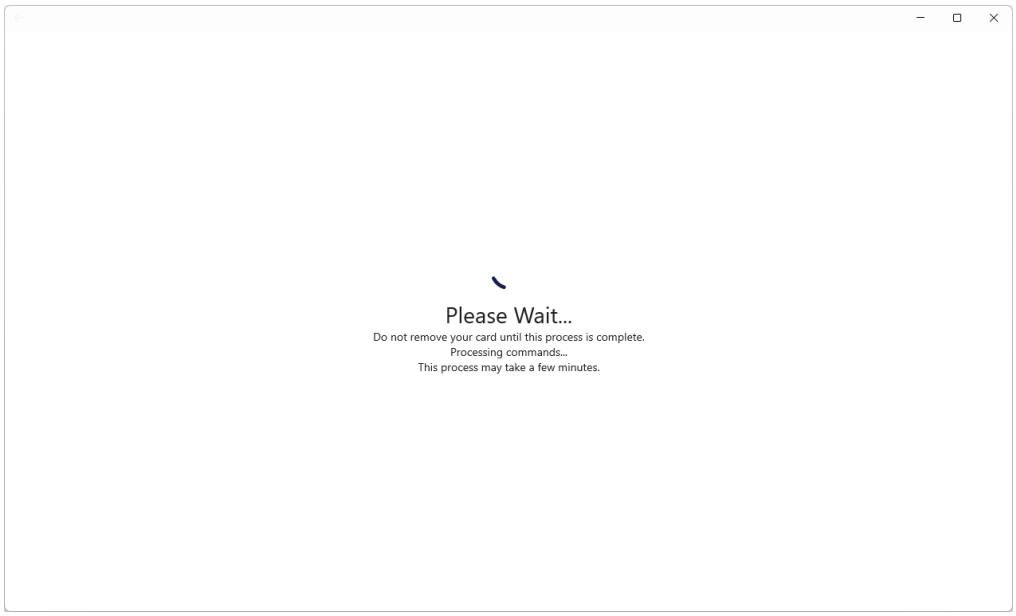
6. Select your device from the list.

   You must now provide a PIN for your new device.



7. Type your new PIN and confirm it, then click **Continue**.

   The MyID Client for Windows collects your device.



8. When the collection has completed, you can remove your device from the reader.

5.2 Activating a device

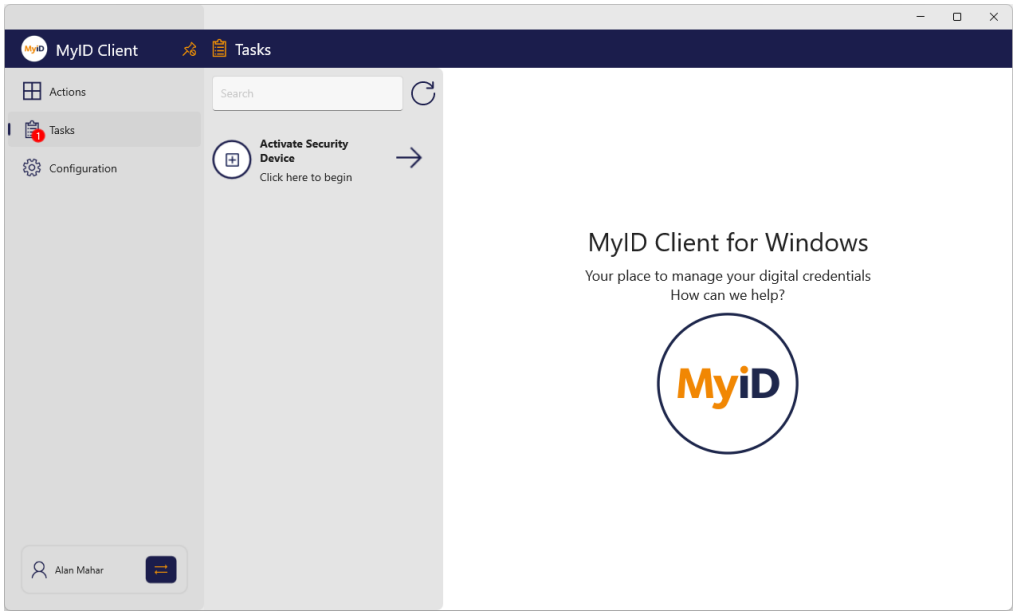
You can use the MyID Client for Windows to activate a device. For example, your organization may ship you a locked device; until you activate it using the MyID Client for Windows, no-one can use it.

Currently, the MyID Client for Windows supports the use of authentication codes for device activation.

Using this task requires access to the **Activate Card** workflow in **Edit Roles**.

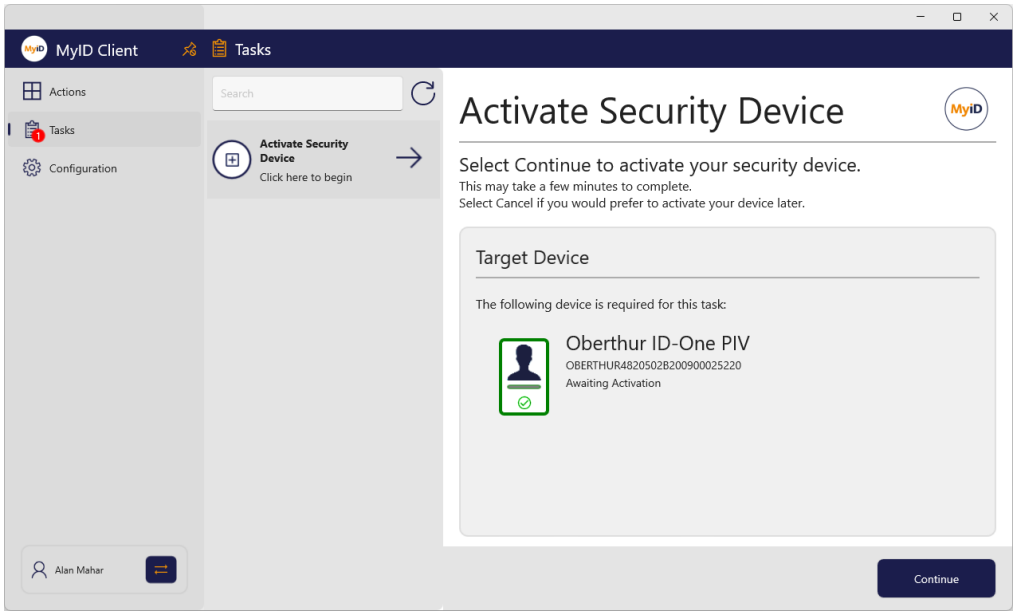
To activate a device:

1. Click the **Tasks** option.



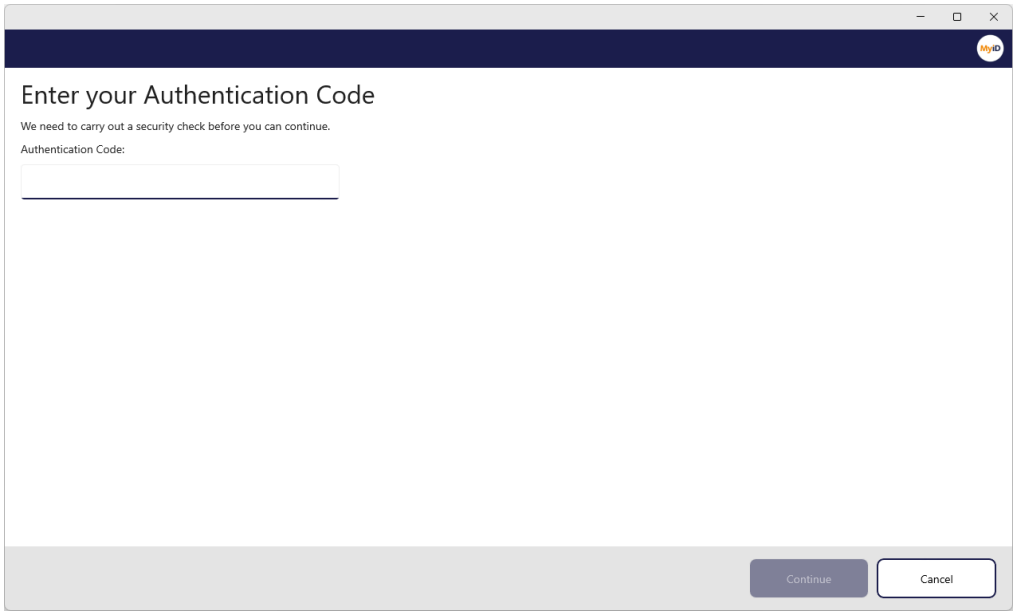
2. Click the **Activate Security Device** task in the list.

   The MyID Client for Windows displays information about the target device that is required for this task.

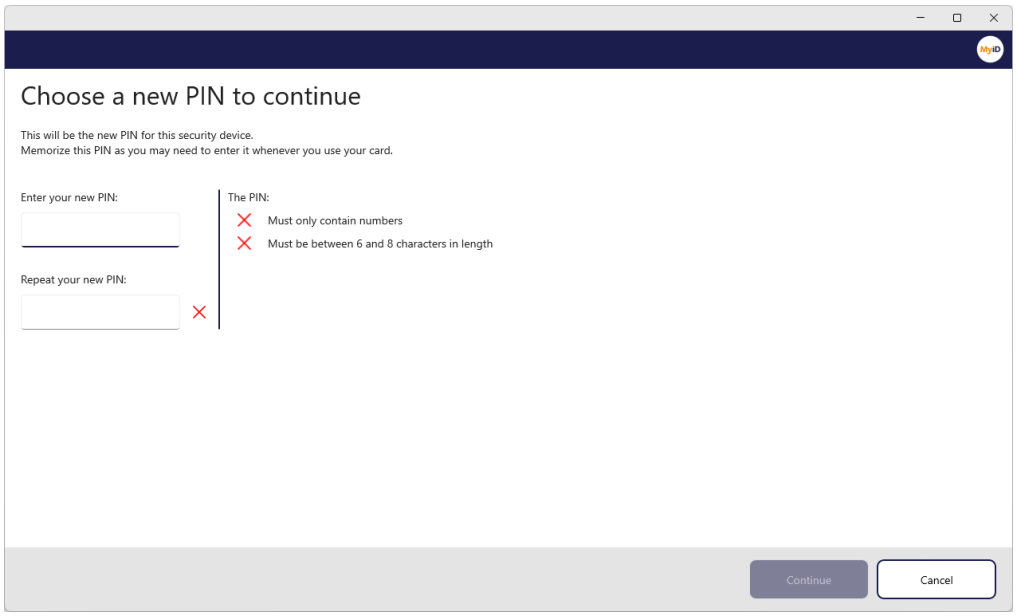


   For device activation, you must use a specific device; the MyID Client for Windows displays the device type and serial number of the device you need to activate.

   Note: Make sure you have an authentication code for device activation before you click **Continue**.

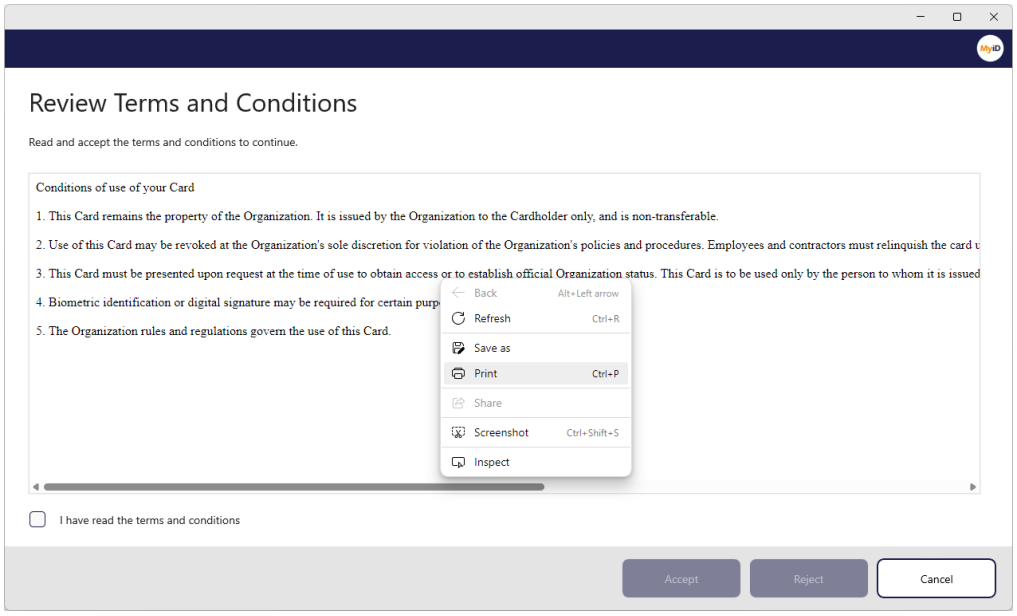


3. Type your authentication code, then click **Continue**.



4. Type and confirm the new PIN for your device, then click **Continue**.
5. If your credential profile is configured for the acceptance of terms and conditions, accept the terms and conditions and continue.

   Note: If you want to print the terms and conditions, right-click the Window and select **Print** from the pop-up menu.



   You may be prompted to enter your PIN to confirm your acceptance.

   The MyID Client for Windows activates your device.

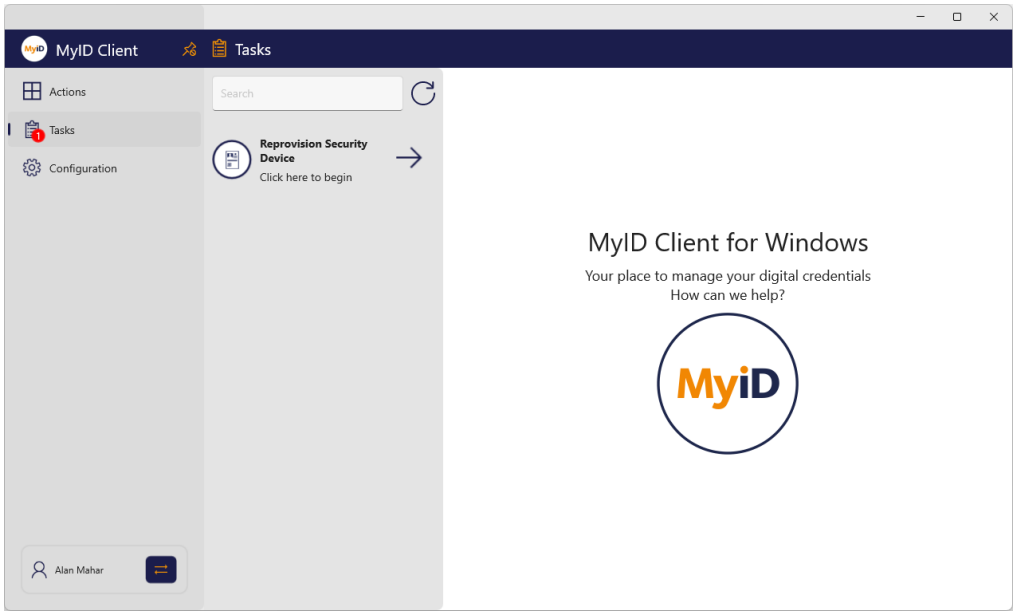
5.3 Collecting an update for a device

You can use the MyID Client for Windows to collect a pending update for your device. For example, your organization may have requested an update for your device to change the credential profile.

Using this task requires access to the **Collect My Updates** workflow in **Edit Roles**. In addition, this task requires a card that has been issued with MyID Logon capabilities; you must also be permitted to log on with a smart card.

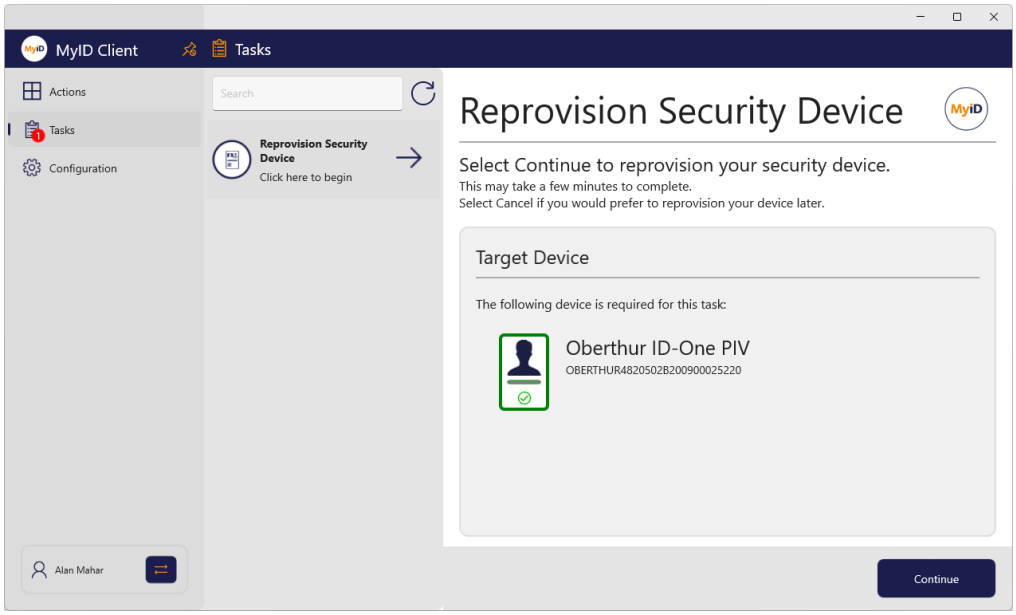
To collect an update:

1. Click the **Tasks** option.

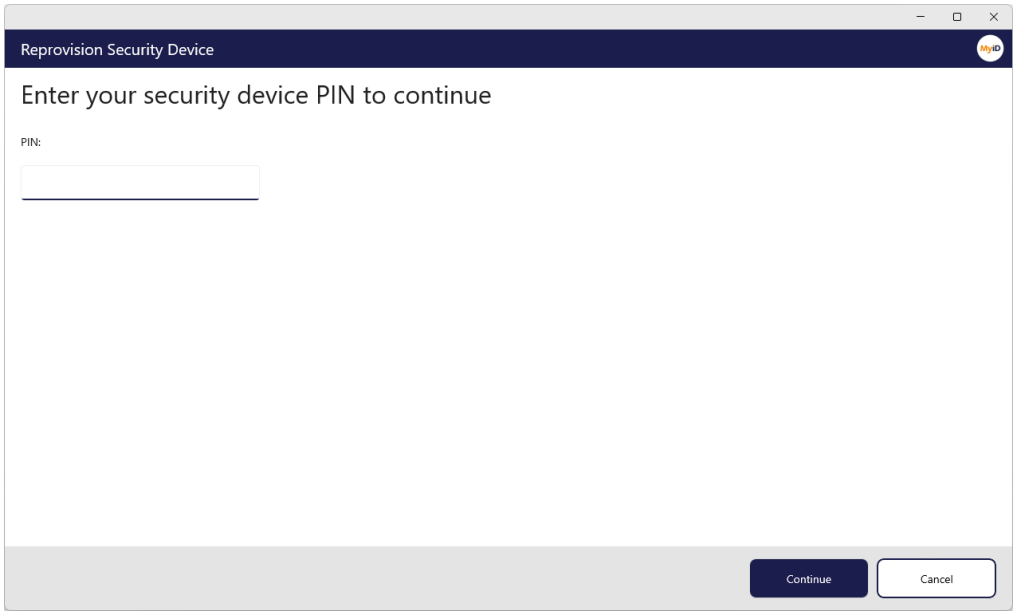


2. Click the **Update Security Device** or **Reprovision Security Device** task in the list.

   The MyID Client for Windows displays information about the target device that is required for this task.

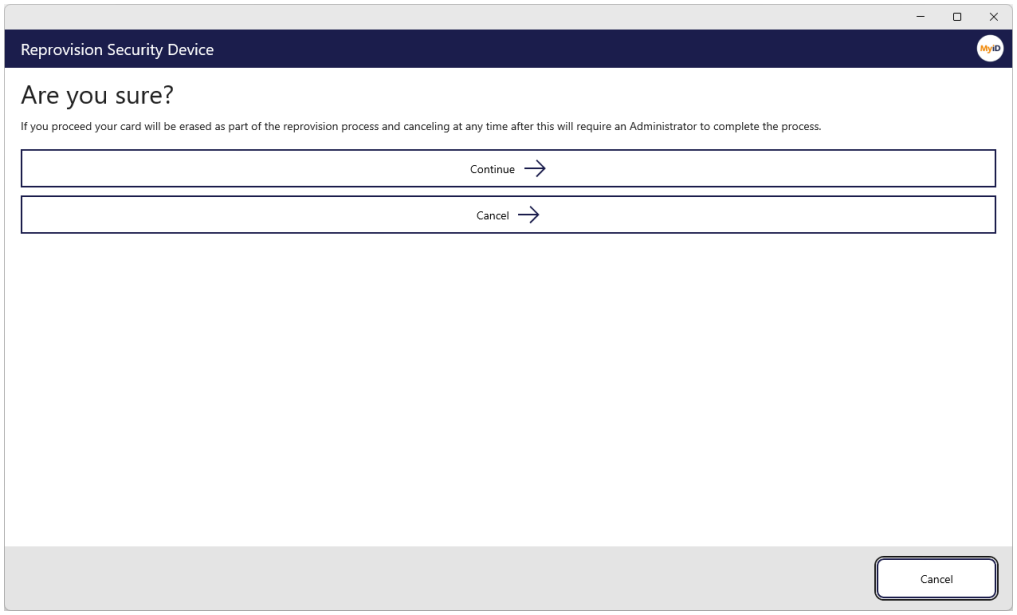


3. Insert the required device and click **Continue**.

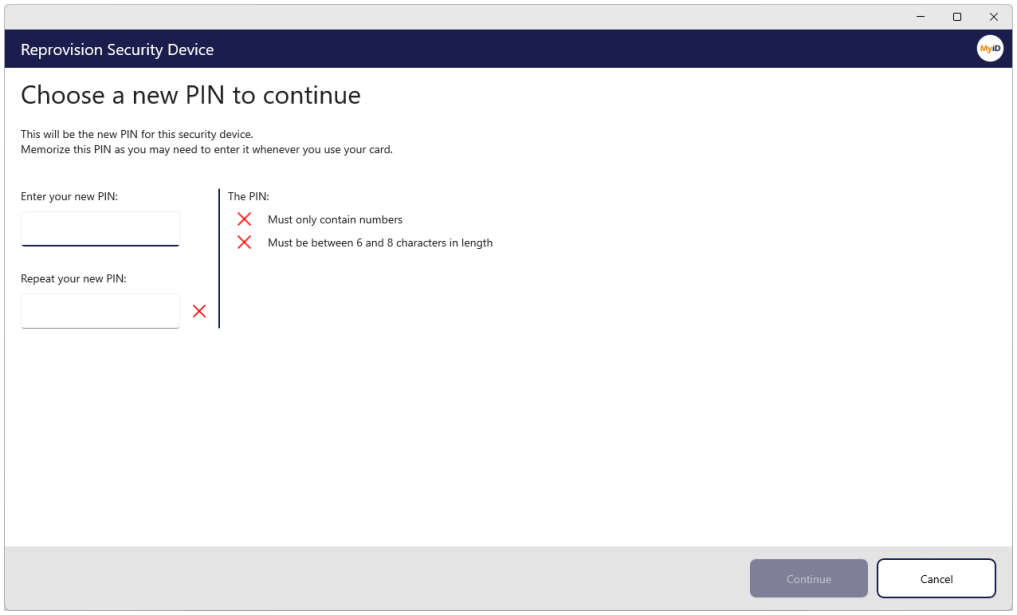


4. Type your device PIN and click **Continue**.

   If the request has been configured to carry out a full reprovision, the MyID Client for Windows displays a confirmation screen.



5. If you are carrying out a full reprovision, provide a new PIN.



   The MyID Client for Windows updates your device.

5.4 Collecting a replacement device

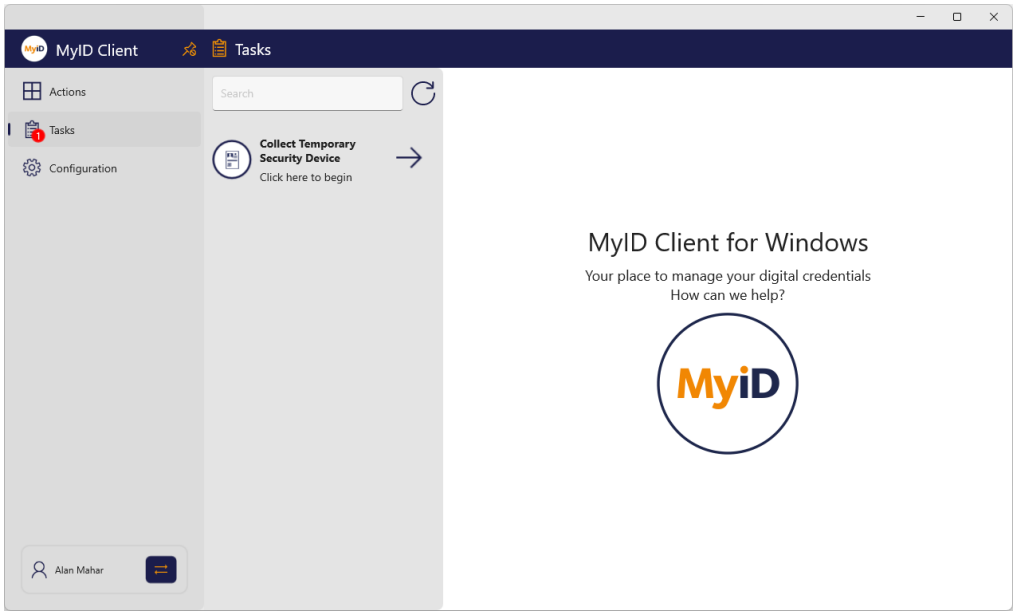
You can use the MyID Client for Windows to collect a temporary or permanent replacement device. For example, if you have forgotten your smart card, an operator can request a temporary smart card to allow you access to your systems.

Using this task requires access to the **Collect My Card** workflow in **Edit Roles**.

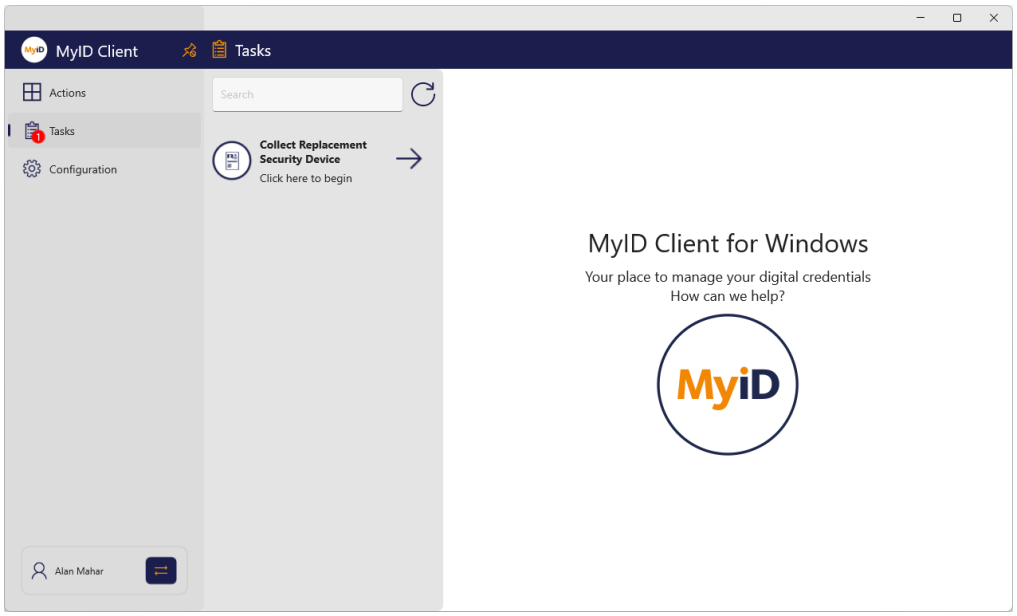
To collect a replacement device:

1. Click the **Tasks** option.

   The option presented depends on whether you have a temporary device waiting:

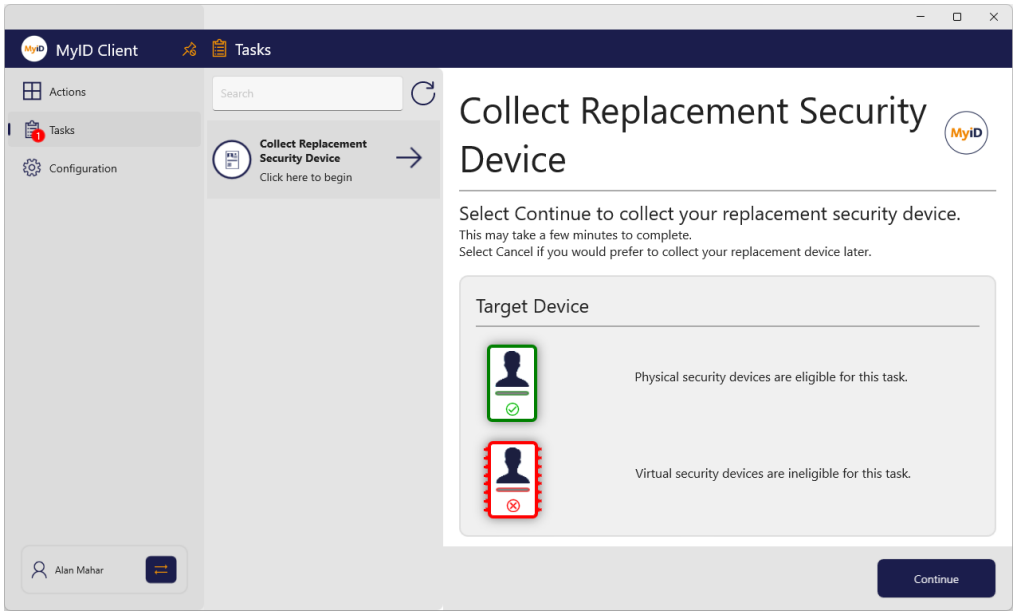


   Or a permanent replacement:



2. Click one of the following options:
   - **Collect Temporary Security Device** – collect a temporary device; for example, for a forgotten smart card.
   - **Collect Replacement Security Device** – collect a permanent replacement device; for example, for a damaged smart card.

   The MyID Client for Windows displays information about the target device that is required for this task.



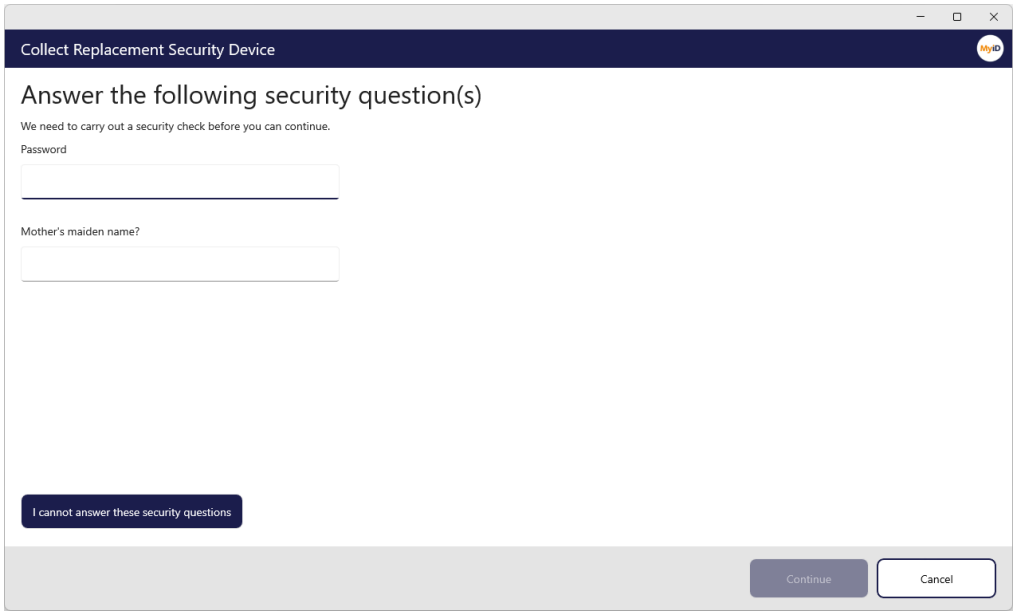
3. Click **Continue**.

   You must now authenticate to the MyID server.

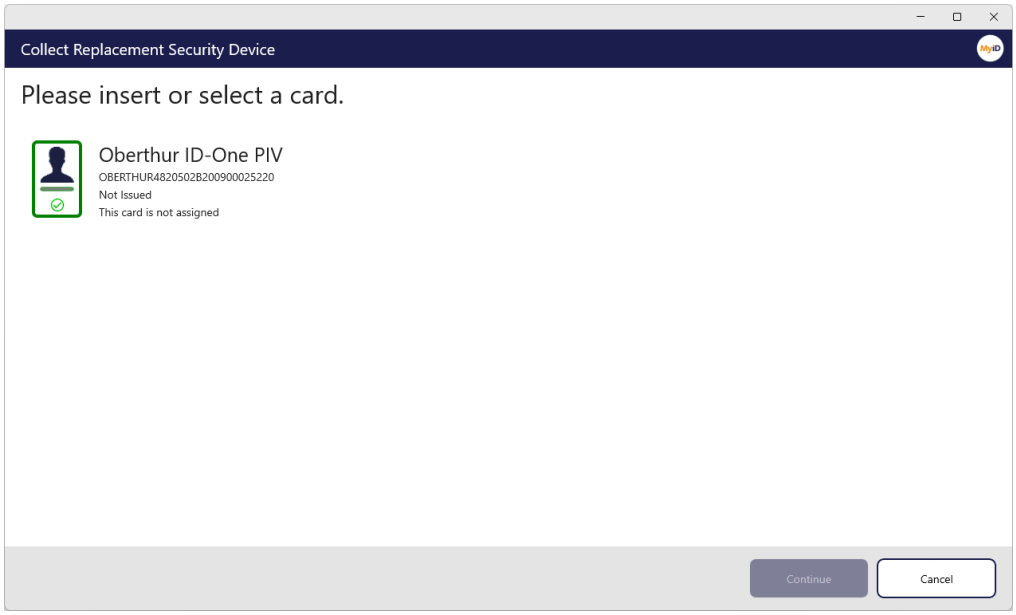
   You must have permission to authenticate using security phrases or an external identity provider.

   Note: The order of these authentication methods is determined by the **Logon Priority** tab in the **Security Settings** workflow in MyID Desktop. **Windows Logon** is not available as an option in the MyID Client for Windows; also, you cannot use an external identity provider if the credential profile for the device being collected requires activation.

   For details of using external identity providers, see the *Setting up an external identity provider* section in the ***MyID Authentication Guide***.

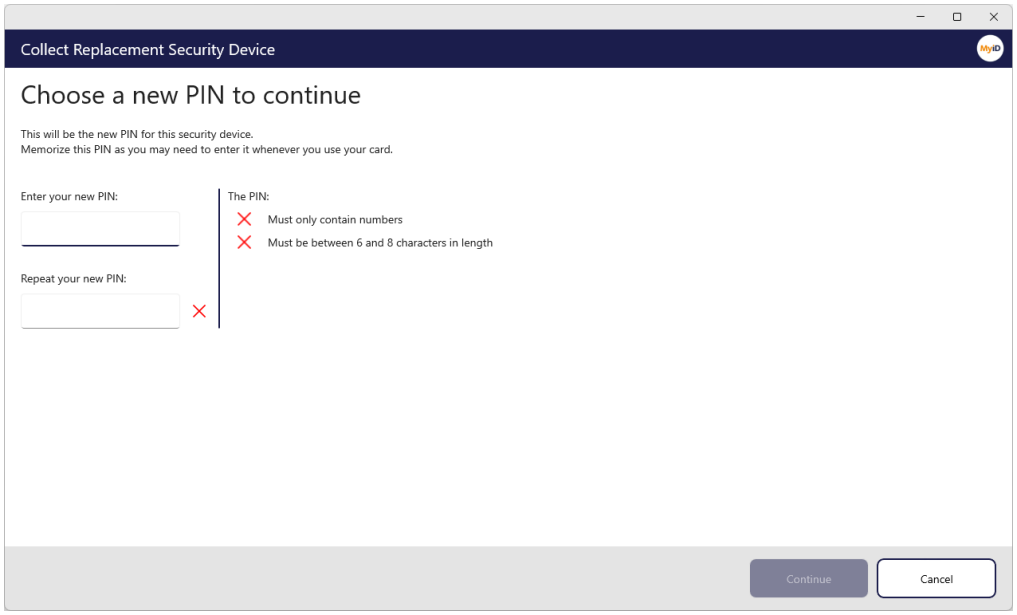


4. Provide your authentication details then click **Continue**.
5. Insert your smart card into a card reader, or your USB token into the USB port.



6. Select your device from the list.

   You must now provide a PIN for your new device.



7. Type and confirm the new PIN for your device, then click **Continue**.

   The MyID Client for Windows issues your device.

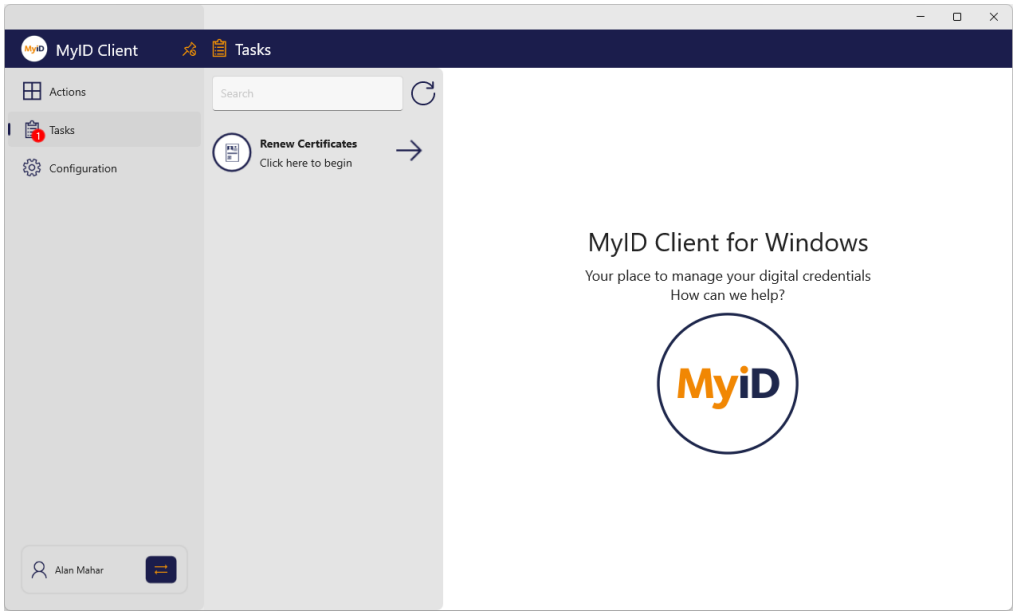
5.5 Collecting a certificate renewal

If you have been issued certificates that have been configured for automatic renewal, when the certificates are near expiry, MyID creates a task for you to collect an update for your device containing your renewed certificates.

Using this task requires access to the **Collect My Certificates** workflow in **Edit Roles**. In addition, this task requires a card that has been issued with MyID Logon capabilities; you must also be permitted to log on with a smart card.

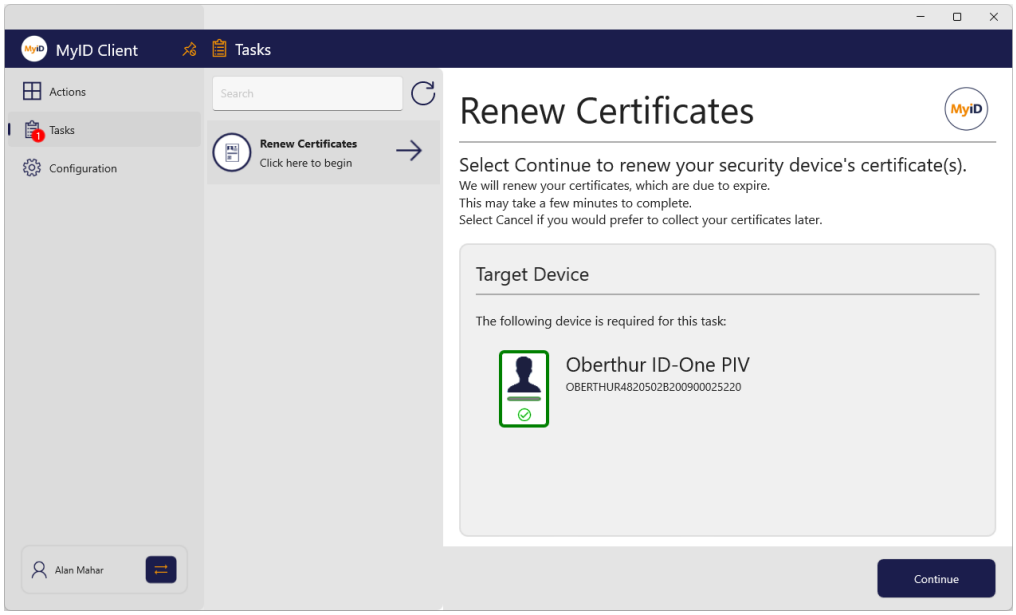
To collect a certificate renewal:

1. Click the **Tasks** option.



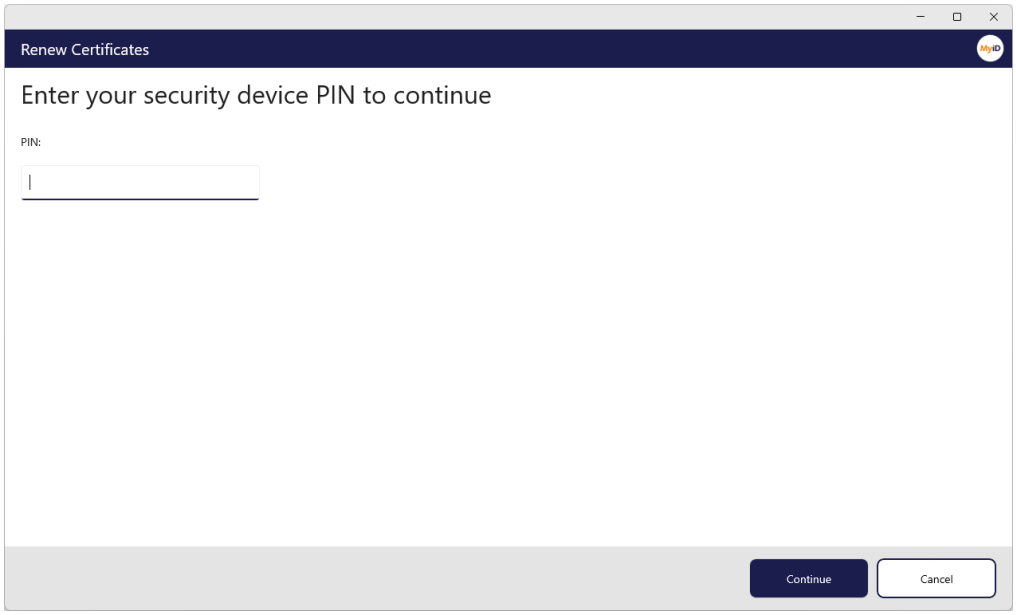
2. Click the **Renew Certificates** task in the list.

   The MyID Client for Windows displays information about the target device that is required for this task.



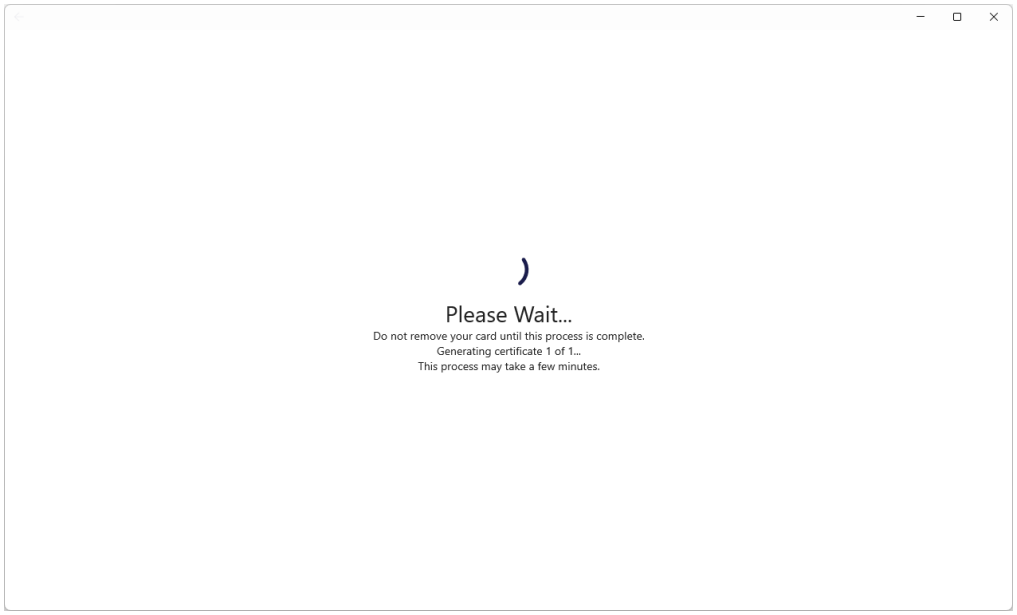
3. Insert your smart card into a card reader, or your USB token into the USB port, and click **Continue**.

   You must now provide the PIN for your device.



4. Type your PIN and click **Continue**.

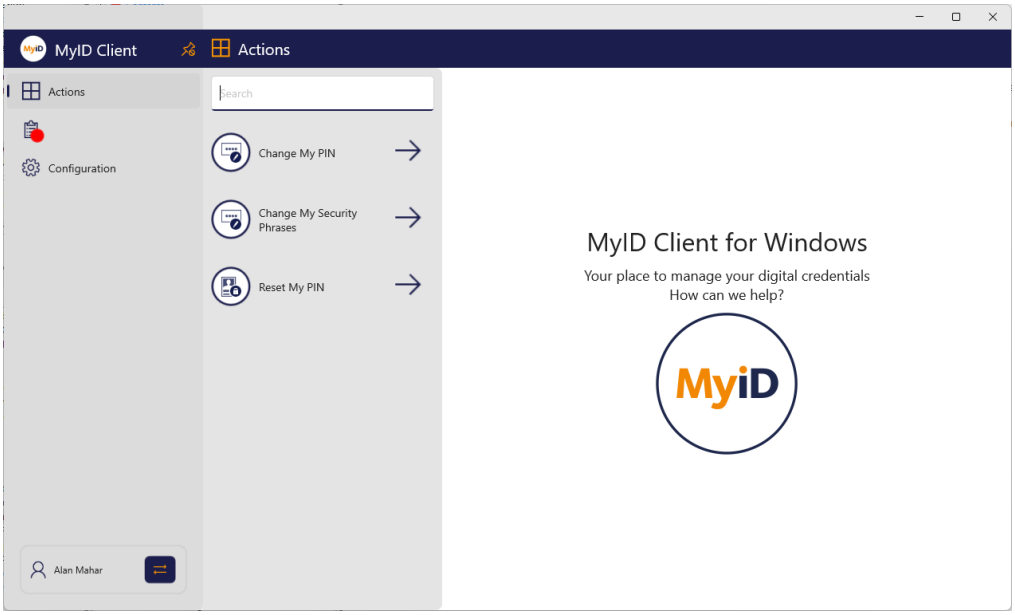
   The MyID Client for Windows updates your device with your renewed certificates.



6 Carrying out self-service actions

The MyID Client for Windows provides several features that you can use at any time, without asking for an operator to generate the task for you.

Click the **Actions** option, and the list of available actions appears. You can use the **Search** box to search for a particular action.



You can:

- Change the PIN of your device.

  See section *6.1*, *Changing your PIN*.
- Change your security phrases.

  See section *6.2*, *Changing your security phrases*.
- Reset your PIN if you do not know the current PIN.

  See section *6.3*, *Resetting your PIN*.
- Request and collect an update your device.

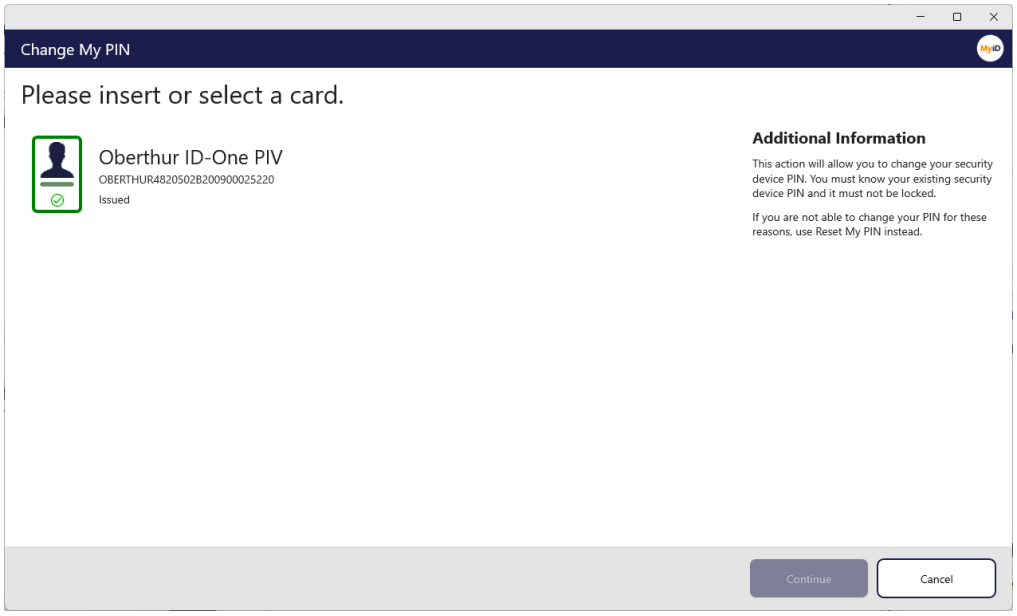
  See section *6.4*, *Updating your device*.

6.1 Changing your PIN

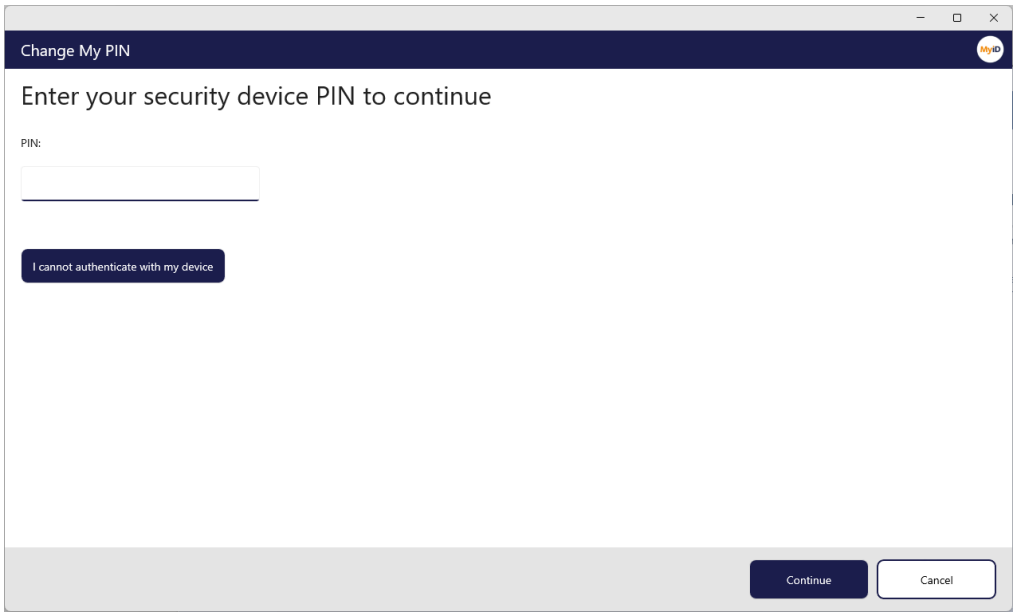
To change the PIN on your device, you must have a role that has access to the **Change PIN** workflow.

To change your PIN:

1. From the **Actions** list, click **Change My PIN**.

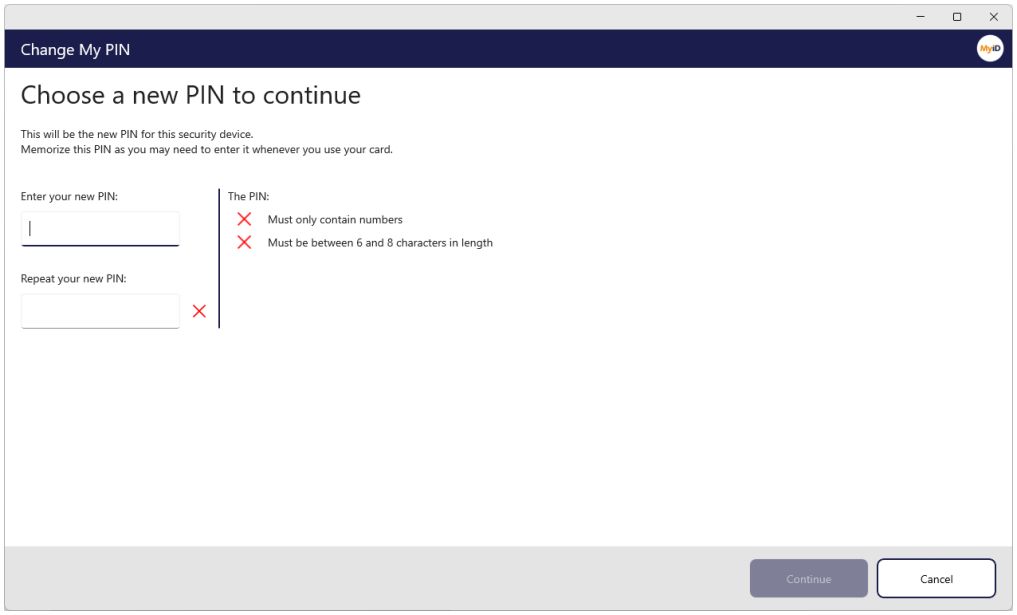


2. Insert your device into the card reader or USB slot, then select it from the list of displayed devices and click **Continue**.



3. Type the current **PIN** for your device, then click **Continue**.

   Note: If you do not know the PIN for your device, you may be able to use the **Reset My PIN** action to provide a new PIN instead. This feature requires additional configuration for your MyID system. See section *6.3*, *Resetting your PIN* for details.



4. Type your new PIN and confirm it, then click **Continue**.

   The MyID Client for Windows updates your device with the new PIN.

6.2 Changing your security phrases

To change the PIN on your device, you must have a role that has access to the **Change My Security Phrases** workflow.

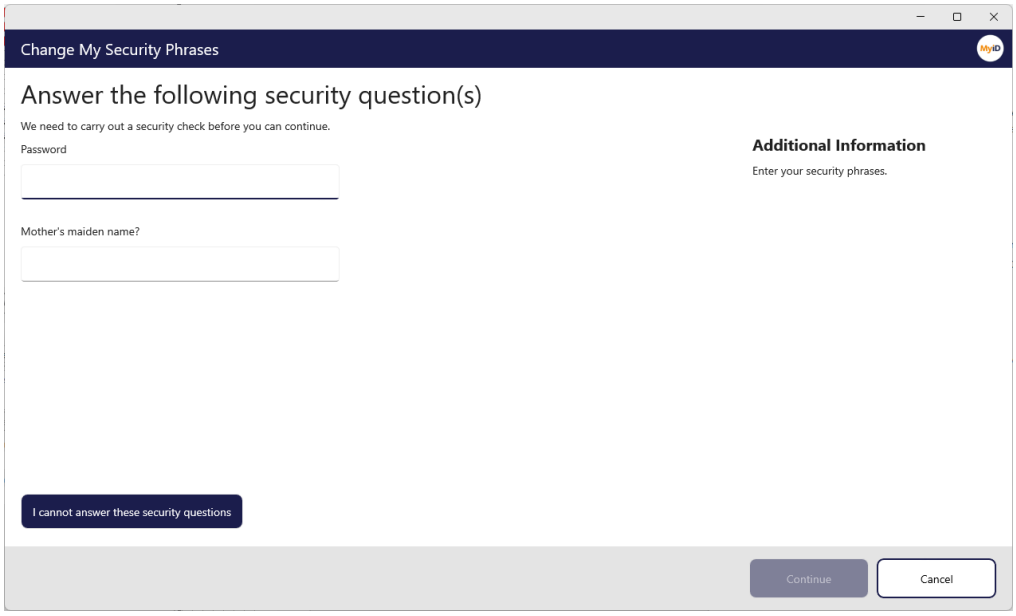
You must also have a way of authenticating yourself to the MyID Client for Windows – if you do not remember your existing security phrases, you must have an issued device. If you cannot remember your existing security phrases and do not have an issued device, you cannot use the MyID Client for Windows to change your security phrases, and must contact an operator who can change your security phrases for you.

To change your security phrases:

1. From the **Actions** list, click **Change My Security Phrases**.
2. Authenticate to the MyID Client for Windows.

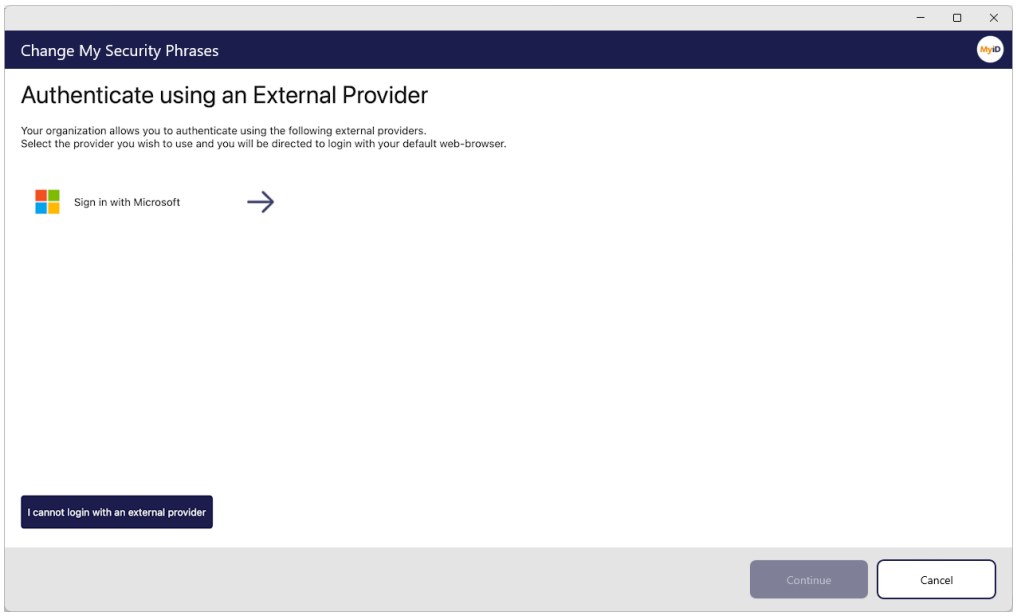
   Note: The order of these authentication methods is determined by the **Logon Priority** tab in the **Security Settings** workflow in MyID Desktop. The MyID Client for Windows always attempt to use Window Logon first.

   To authenticate using security phrases, provide your existing security phrases to continue.



   To try an alternative method of authentication, click **I cannot answer these security questions**.

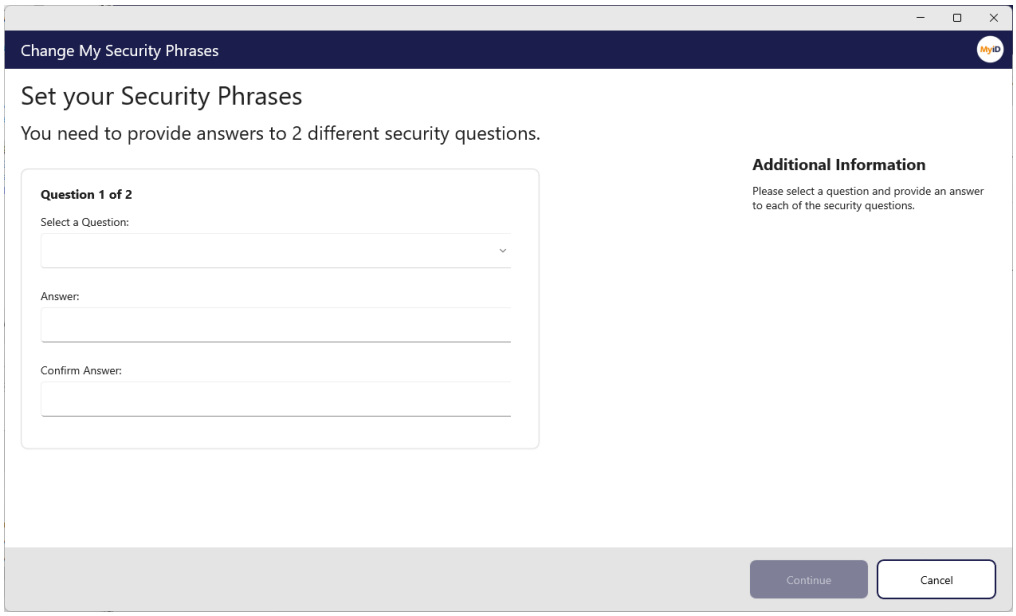
To authenticate using an external identity provider (for example, Microsoft Entra), click the link and authenticate using the external website.



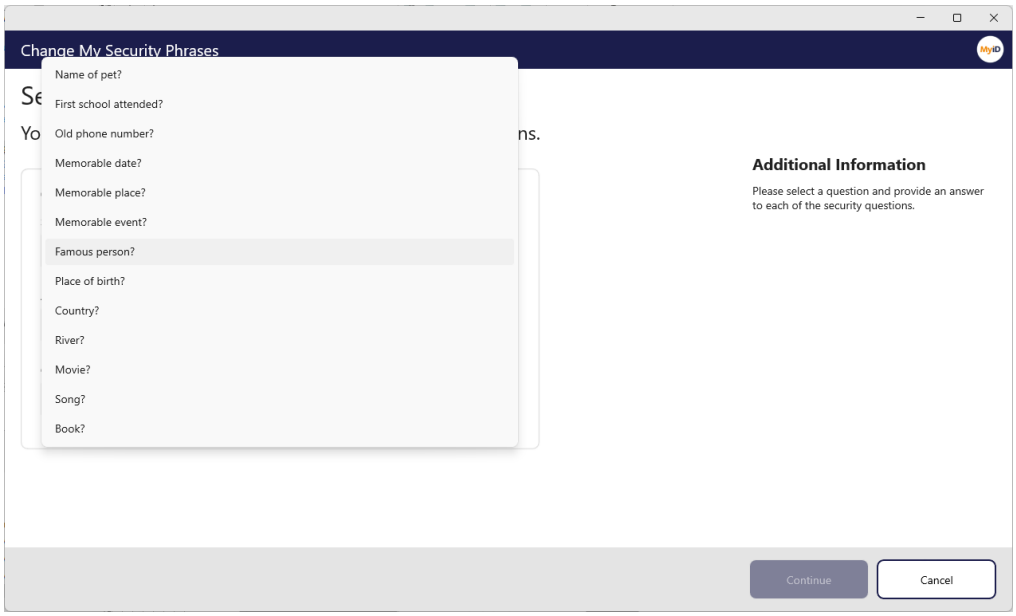
To try an alternative method of authentication, click **I cannot login with an external provider**.

For details of using external identity providers, see the *Setting up an external identity provider* section in the ***MyID Authentication Guide***.

Once you have authenticated, you can set your security phrases.



3. Select a question from the list.



4. Type your answer and confirm it, then click **Continue**.

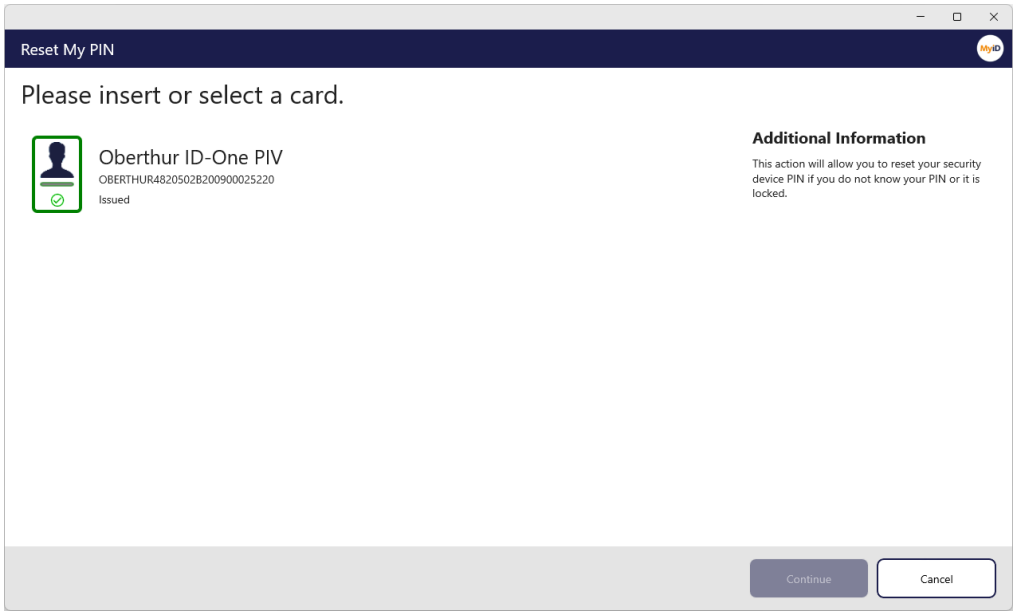
   Note: By default, MyID is configured for two security phrases, except for the startup user, which requires only one. The number of security phrases is determined by the **Number of security questions to register** option on the **PINs** page of the **Security Settings** workflow in MyID Desktop. Repeat the process of selecting a question and typing your answer for each required security question.

6.3 Resetting your PIN

To change the PIN on your device, you must have a role that has access to the **Unlock My Card** workflow.

To reset the PIN of your device:

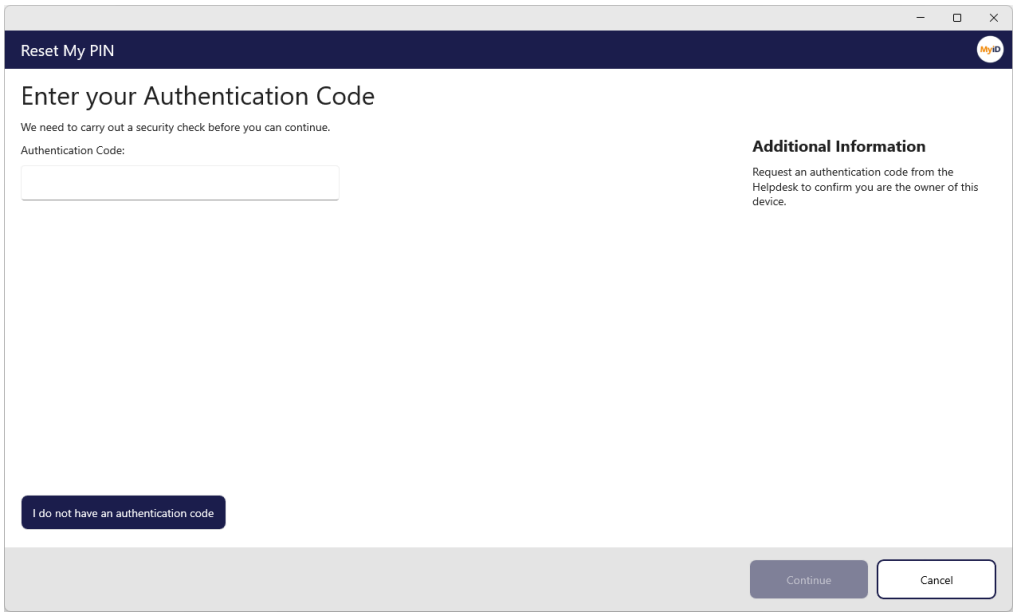
1. From the **Actions** list, click **Reset My PIN**.



2. Insert your device into the card reader or USB slot, then select it from the list of displayed devices and click **Continue**.

   Note: The authentication methods that you must carry out before resetting your PIN is determined by the **Logon Priority** tab in the **Security Settings** workflow in MyID Desktop, or through the **Self-Service Unlock Authentication** option in the credential profile.

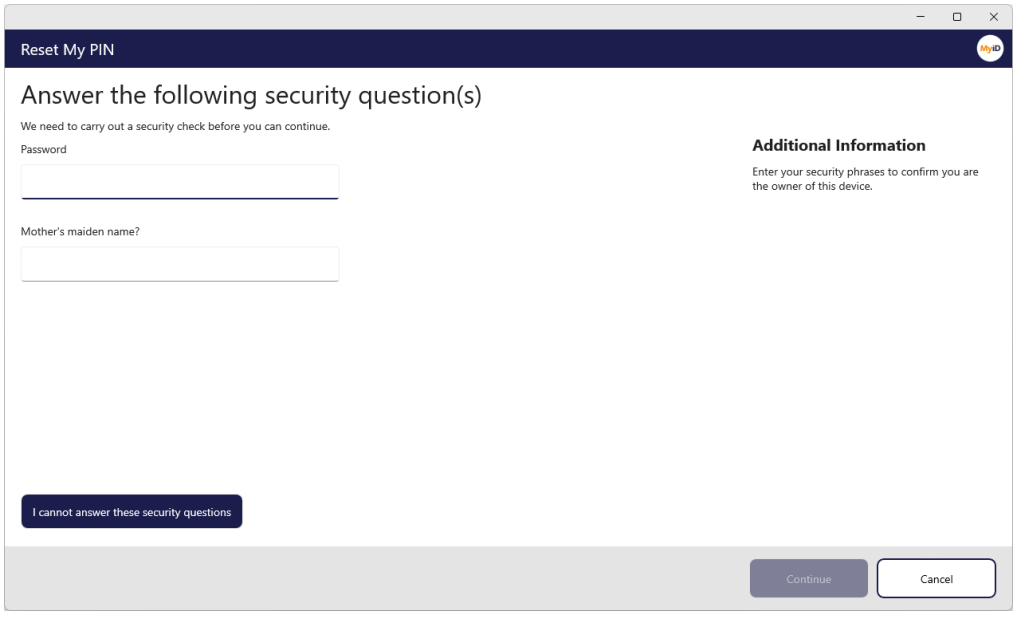
To authenticate using an authentication code, type your authentication code to continue.



A MyID operator can use the View Device screen in the MyID Operator Client to send or read out an authentication code for your device that you can use to continue.

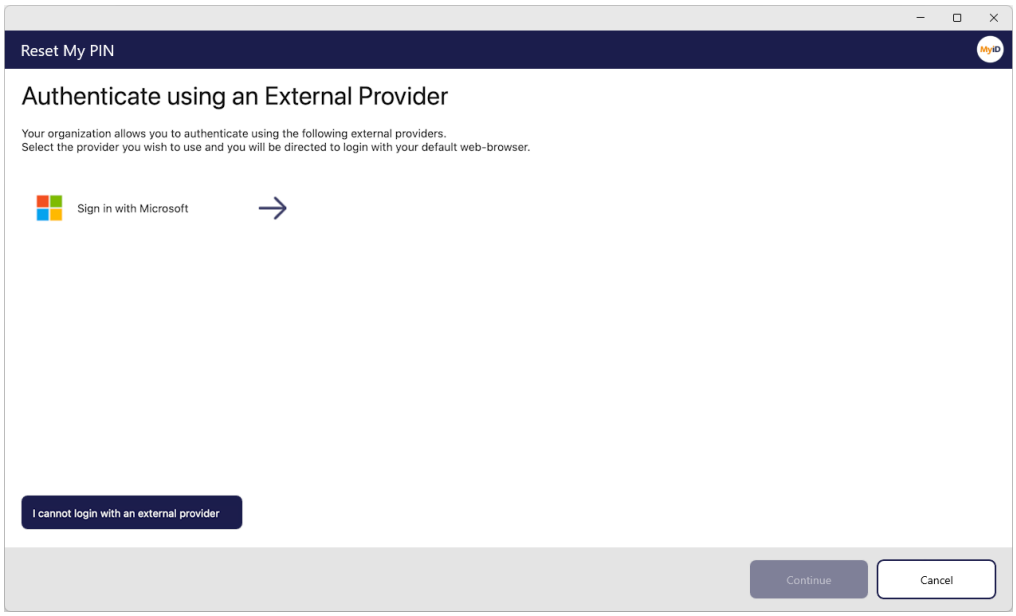
If you do not have an authentication code, click **I do not have an authentication code**.

To authenticate using security phrases, provide your security phrases to continue.



To try an alternative method of authentication, click **I cannot answer these security questions**.

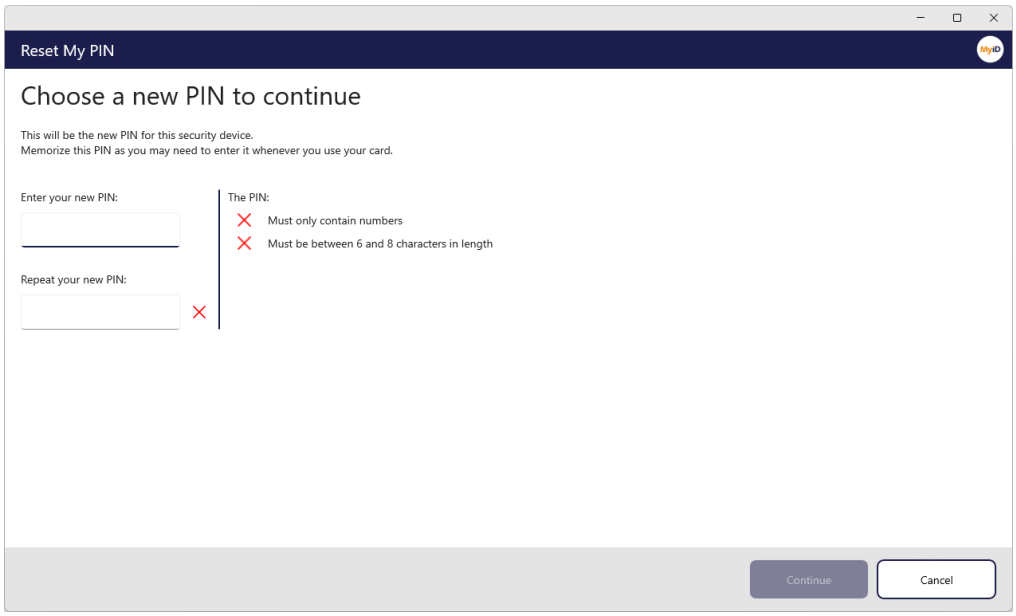
To authenticate using an external identity provider (for example, Microsoft Entra), click the link and authenticate using the external website.



To try an alternative method of authentication, click **I cannot login with an external provider**.

For details of using external identity providers, see the *Setting up an external identity provider* section in the ***MyID Authentication Guide***.

Once you have authenticated, you can set your new PIN.



3. Type and confirm your new PIN.

   The MyID Client for Windows updates your device with the new PIN.

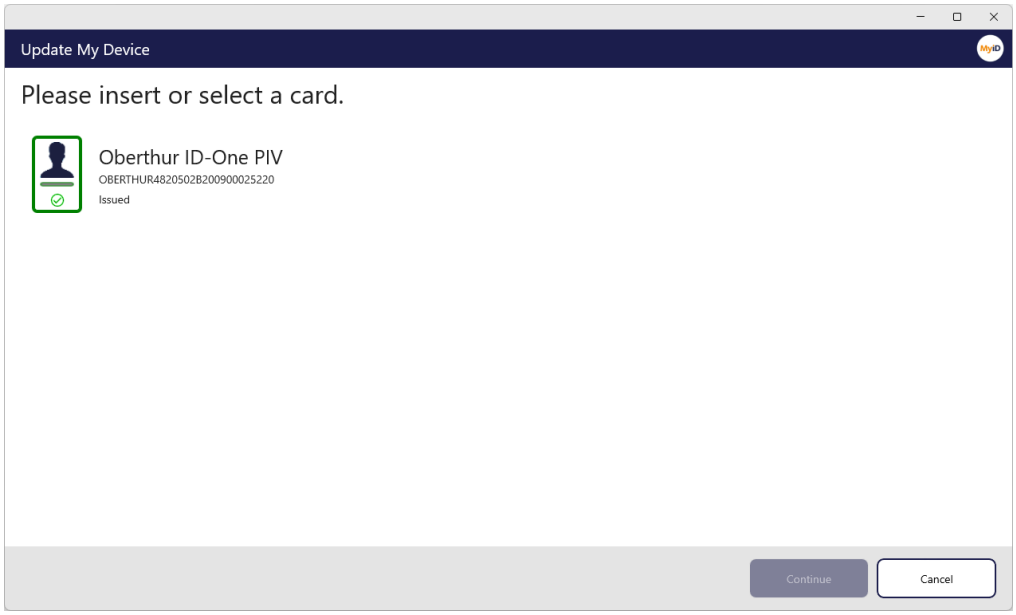
6.4 Updating your device

To carry out an update for your device, you must have a role that has access to the **Collect My Updates** and **Update My Device** workflows.

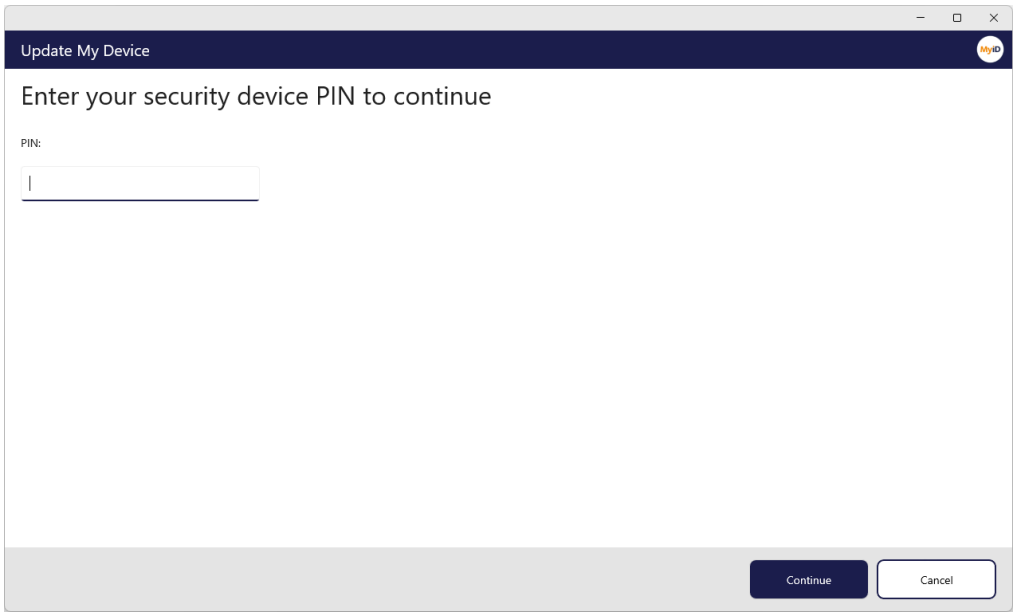
Note: Self-service device update requires additional configuration, as it may not be suitable for all organizations. This configuration also determines what sort of device update is available; you may be able to update your device to the latest credential profile, or you may be able to reprovision your device completely. See section *3.2*, *Setting up self-service device update*.

To request and collect an update for your device:

1. From the **Actions** list, click **Update My Device**.

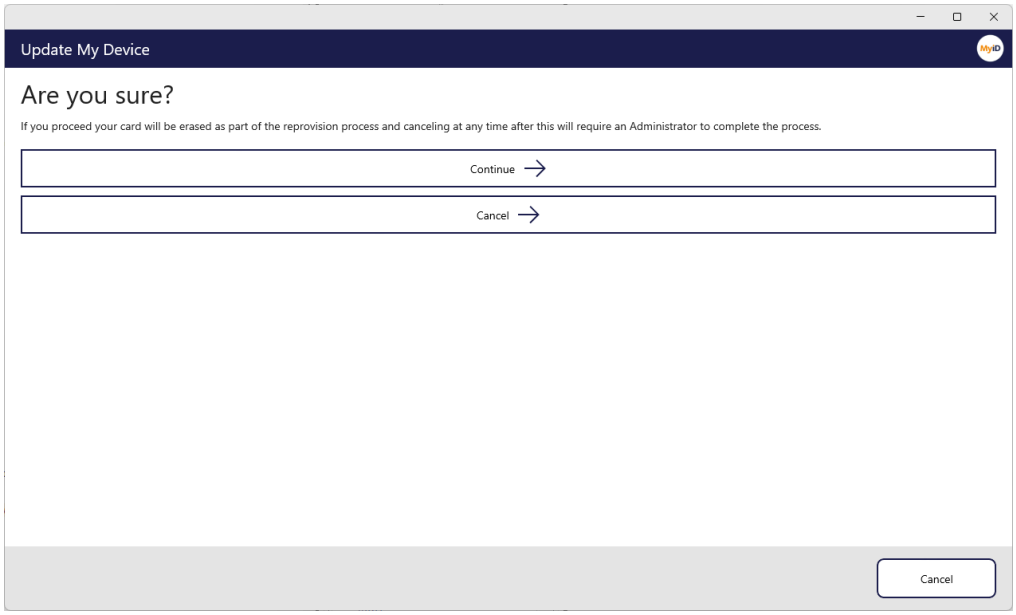


2. Insert your device into the card reader or USB slot, then select it from the list of displayed devices and click **Continue**.

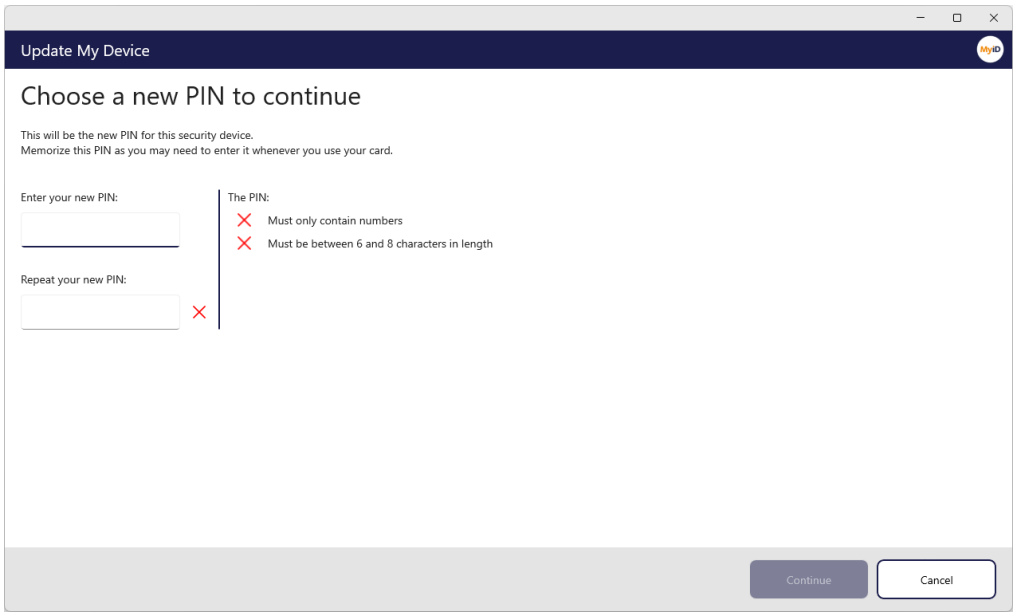


3. Type the PIN for your device, then click **Continue**.

   If your system has been configured to carry out a full reprovision for self-service device updates, the MyID Client for Windows displays a confirmation screen.



Click **Continue**.



4. Type and confirm your new PIN, then click **Continue**.

   The MyID Client for Windows updates your device.

7 Configuring the MyID Client for Windows

You can configure the MyID Client for Windows in the following ways:

- Using the Configuration screen within the MyID Client for Windows.

  See section *7.1*, *Setting configuration options within the MyID Client for Windows*.
- Using an administrator override configuration file.

  See section *7.2*, *Setting up an administrator configuration override file*.

7.1 Setting configuration options within the MyID Client for Windows

To set the configuration options:

1. Select the **Configuration** option.

   The configuration screen appears.
2. Scroll to the appropriate section and set the relevant options.

   Note: Your administration may have restricted your ability to change some or all of your configuration options.
3. Click **Apply Changes**.

   To revert to the previous settings, click **Revert Changes**.

   To go back without making any changes, click **Back**.

7.1.1 Administrator-configured options

Your administrator may have set up a configuration override file that provides default values or prevents you from changing values; see section *7.2*, *Setting up an administrator configuration override file*.

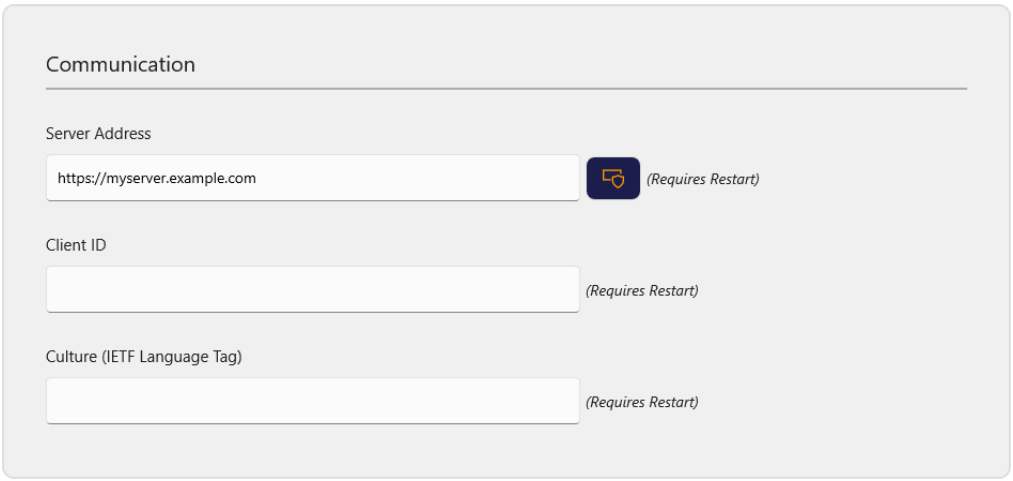
The MyID Client for Windows displays icons next to the option fields for administrator-configured options:

Icon	Description
	The value was provided by an administrator configuration override file.
	The value was provided by an administrator configuration override file, and the current value is different from the administrator-provided value; click the icon to revert to the administrator-configured value.

7.1.2 Setting communication options

To set the communication options:

1. Select the **Configuration** option.



2. In the Communication section, set the following options:
   - **Server Address** – type the address of the MyID web services server.

     For example:

     `https://myid.example.com`

     Note: You must start the server address with `https://`
   - **Client ID** – optionally, type a unique identifier that the MyID Client for Windows uses to identify itself to the server.

     You can capture this information in the audit to determine which workstation originated a request. See the *Logging the client IP address and identifier* section in the ***Administration Guide*** for details.
   - **Culture (IETF Language Tag)** – provide an IETF language tag (for example, `en-US`) that overrides the default behavior of using the language culture setting of the operating system; for example, you may have a UK English system but want to display the MyID Client for Windows interface in US English.
3. Click **Apply Changes**.

Note: For these settings to take effect, you must restart the MyID Client for Windows.

7.1.3 Setting authentication options

To set the authentication options:

1. Select the **Configuration** option.

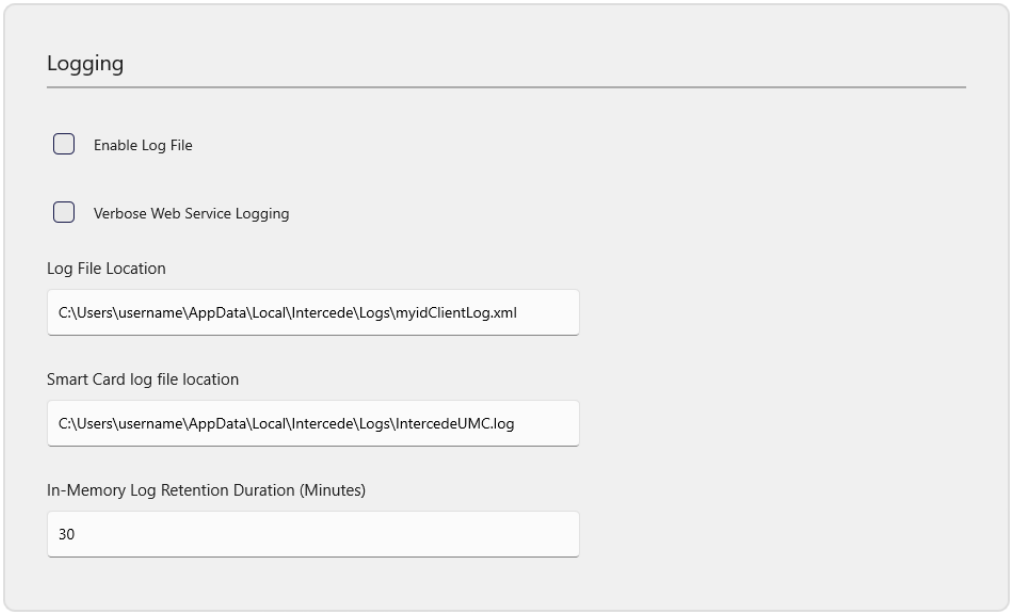
2. In the Authentication section, set the following options:
   - **Username** – optionally, type the username you want to the MyID Client for Windows to use each time you start it up.
   - **Enable 'Remember Me'** – select this option to allow users to store their username between sessions.
3. Click **Apply Changes**.

Note: For these settings to take effect, you must restart the MyID Client for Windows.

7.1.4 Setting logging options

To set the logging options:

1. Select the **Configuration** option.



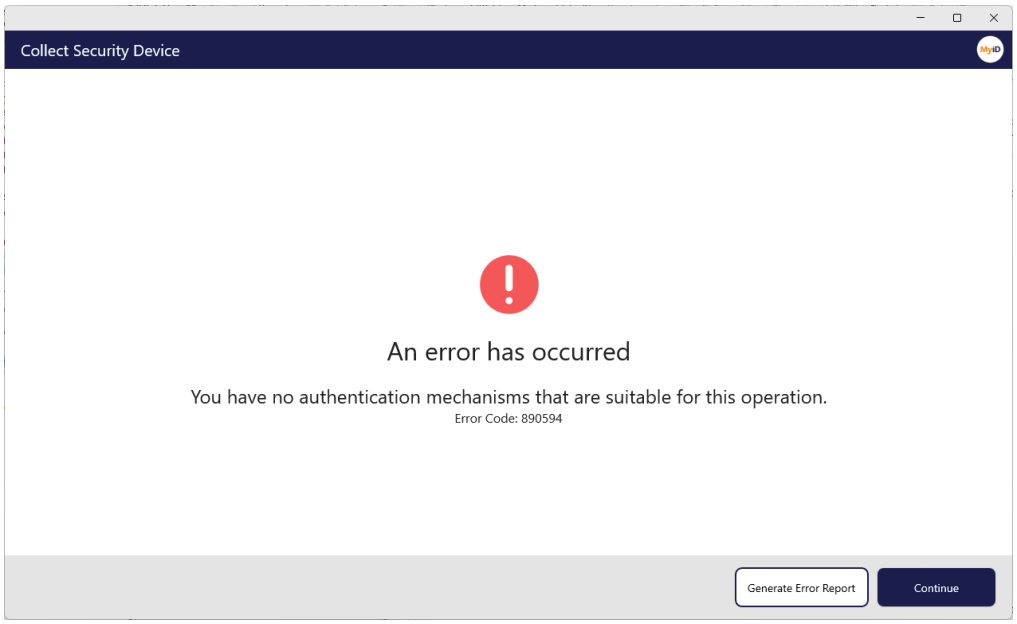
2. In the Logging section, set the following options:
   - **Enable Log File** – select this option to enable logging.
   - **Verbose Web Service Logging** – select this option to log all network communication with MyID. You are recommended to use this only for diagnostics, as it may result in sensitive information being included in the logs.
   - **Log File Location** – type the location to which you want to write the log file.
   - **Smart Card log file location** – type the location to which you want to write the smart card log file.

     Smart card log events are stored separately from general log events.
   - **In-Memory Log Retention Duration (Minutes)** – type the number of minutes of log entries to retain in memory. This log is used for just-in-time error reports. After the configured number of minutes, log events are discarded. By default, reports contain the last 30 minutes of log entries.
3. Click **Apply Changes**.

You can also generate a just-in-time log when an error occurs; this does not require logging to be enabled, but is always available.

To generate a just-in-time error report:

1. Carry out an operation that generates an error.



2. Click **Generate Error Report**.
3. Select the folder into which you want to write the report, then click **Open**.
4. Click **OK**.

7.1.5 Setting accessibility options

You can set the page timeout for the MyID Client for Windows screens. The page timeout is used for security reasons; for example, when setting a new PIN for your device. You may want to increase the timeout value if, for example, you are using a screen reader that increases the time it takes to use the screen.

To change the page timeout:

1. Select the **Configuration** option.

2. In the Accessibility section, set the following option:
   - **Page Timeout** – type the number of seconds that you want to allow before the page times out.
3. Click **Apply Changes**.

7.1.6 Setting advanced options

You can set advanced configuration options for which there is no dedicated field on the configuration screen.

For example, if you are using a version of MyID CMS earlier than 12.11, you must set the `UseLegacySsaPlatform` configuration option to `true` to allow the MyID Client for Windows to impersonate the Self-Service App and be recognized by the server.

To set a custom configuration option:

1. Select the **Configuration** option.

2. In the Advanced Configuration section, type a **Key** and a **Value** for the option.

   For example:

   - **Key** – `UseLegacySsaPlatform`
   - **Value** – `true`

3. Click **Add**.
4. Click **Apply Changes**.

7.1.6.1 Advanced configuration options

The following advanced configuration options are available:

Option	Description
`UseLegacySsaPlatform`	If you are using a version of MyID CMS earlier than 12.11, you must set the `UseLegacySsaPlatform` configuration option to `true` to allow the MyID Client to impersonate the Self-Service App and be recognized by the server.
`UseLegacyPassphraseCollection`	If you are using a version of MyID CMS earlier than 12.12, you must set the `UseLegacyPassphraseCollection` configuration option to `true` allow the MyID Client to use the old web-service endpoint; if you set this configuration option, support for authentication using external identity providers is disabled.
`CardPickerHeaderPrecedence`	When displaying devices for selection, the MyID Client tries to use the most recognizable information available as the header for the device in the list. By default, the precedence is: • Device Friendly Name. • Cardholder Name. • Device Type Name. If you want to change this precedence, set the `CardPickerHeaderPrecedence` option to a semi-colon delimited list of the options in your preferred order. • `dfn` – Device Friendly Name. • `chn` – Cardholder Name. • `dtn` – Device Type Name. For example: • `dfn;chn;dtn` – the default precedence. • `chn;dfn;dtn` – prefer the cardholder name over the device friendly name where available. • `dtn` – always use device type name.

7.2 Setting up an administrator configuration override file

As an administrator, you can provide a configuration file that provides overrides to the user's preferences; you can also specify whether the user can override these defaults.

To provide a configuration override file, create the following file:

`%ProgramData%/Intercede/MyID Client/MyIDClientConfig.xml`

For example:

```
<configuration>
    <appSettings>
        <add key="ServerAddress" value="http://myid.example.com"/>
        <add key="Username" value="susan.smith"/>
        <add key="EnableRememberMe" value="true"/>
        <add key="ClientID" value="c522dd89-a35d-4de6-b8d8-35d97614fc69"/>
        <add key="UseLegacySsaPlatform" value="true"/>
        <add key="UseLegacyPassphraseCollection" value="false"/>
        <add key="EnableLogging" value="false" isUserOverridable="true"/>
        <add key="LogFilePath" value="C:\Logs\myidClientLog.xml" isUserOverridable="True"
/>
        <add
key="UmcLogFilePath" value="C:\Logs\IntercedeUMC.log" isUserOverridable="True" />
        <add key="EnableWebServiceLogging" value="false" isUserOverridable="false"/>
        <add key="CardPickerHeaderPrecedence" value="dfn;chn;dtn">
    </appSettings>
</configuration>
```

Each option contains a `key` and a `value`. By default, if the option exists in the configuration file, the user cannot use the Configuration screen in the MyID Client for Windows to override it; if you want the user to be able to override it, you can add `isUserOverridable="true"` to the option.

The following options are available:

- `ServerAddress` – corresponds to the **Server Address** field in the Communication section.
- `Username` – corresponds to the **Username** field in the Authentication section.
- `EnableRememberMe` – corresponds to the **Enable 'Remember Me'** option in the Authentication section.
- `ClientID` – corresponds to the **Client ID** field in the Communication section.
- `UseLegacySsaPlatform` – set this option to `true` to allow you to use the MyID Client for Windows with MyID CMS servers from version 12.4 to version 12.10. This setting is not required for MyID 12.11 or later.
- `UseLegacyPassphraseCollection` – set this option to `true` to allow you to use the MyID Client for Windows with MyID CMS servers from version 12.4 to version 12.11. (If your MyID server is from version 12.4 to version 12.10 you must also set the `UseLegacySsaPlatform` option.) This setting is not required for MyID 12.12 or later.

  Note: If you set this configuration option, support for authentication using external identity providers is disabled.
- `EnableLogging` – corresponds to the **Enable Log File** option in the Logging section.
- `LogFilePath` – corresponds to the **Log File Location** field in the Logging section.
- `UmcLogFilePath` – corresponds to the **Smart Card log file location** field in the Logging section.
- `EnableWebServiceLogging` – corresponds to the **Verbose Web Service Logging** option in the Logging section.
- `CardPickerHeaderPrecedence` – allows you to set the precedence for the label used when selecting a device. See section *7.1.6.1*, *Advanced configuration options* for details.