MyID

Customizing the MyID Operator Client

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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.

Contents

1 Introduction

This document contains instructions on how to customize the MyID Operator Client.

This includes:

- Adding custom links to the database.

  These external web links are controlled by the **Edit Roles** feature of MyID; you can provide different links to different users and operators depending on their roles. You can also supply parameters to the web link from the database to provide information about the logged-in user, and the external page can obtain an access token that allows you to authenticate to the MyID Core API.

  See section *2*, *Adding links to the database*.
- Adding custom links to the configuration file

  These external web links are provided to all users, independent of their role in MyID. You can also provide an authentication token.

  See section *3*, *Adding links to the configuration file*.

  Note: You can combine both methods of adding links; you can add links to the configuration file that are available to all users, and add links to the database that are available depending on the roles of the users.
- Setting a custom theme

  You can specify the colors used for the MyID Operator Client; this color theme is also passed through to MyID Desktop or the Self-Service App when you launch these applications from the MyID Operator Client.

  See section *4*, *Customizing the theme*.
- Adding content to forms.

  You can add your own custom content to forms (for example, View Person). Your content is displayed in a custom panel on the form, and can include HTML, CSS, and JavaScript.

  See section *5*, *Adding content to forms*.
- Customizing logon messages.

  You can translate the text of the licensing or secure configuration warnings that appear on the logon screen of the MyID Operator Client. You can also add custom messages to appear on this screen.

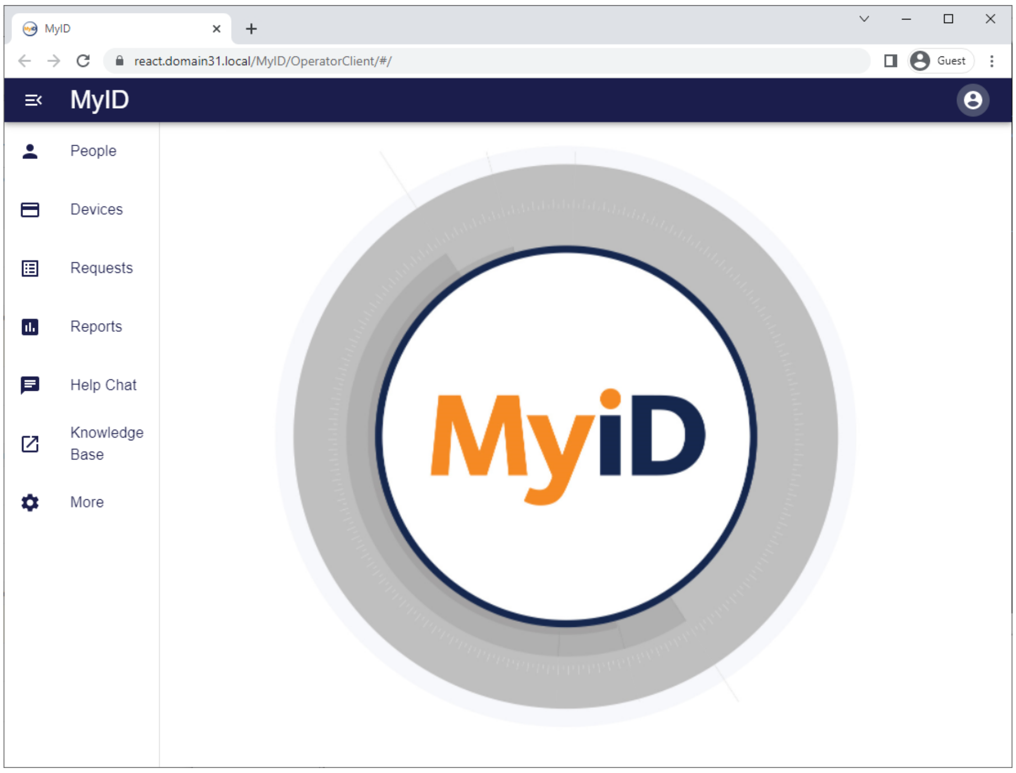
  See section *6*, *Customizing logon messages*.

1.1 Change history

Version	Description
`TLK2025-01`	First version.
`TLK2025-02`	Added details of providing a banner image. Added details of adding content to forms.
`TLK2025-03`	Added details of customizing logon messages. This feature requires MyID 12.15 or later.
`TLK2025-04`	Updated for MyID CMS 12.17. Updated the height of the banner image from 48 pixels to 55.

2 Adding links to the database

You can update the MyID database to add custom links to external web pages. These links appear in the category list in the MyID Operator Client, below the standard categories and above the More category that contains links to administrative workflows in MyID Desktop.



Note: Launching external links does not add any audit or system event information to the MyID database. However, if your external web page interacts with MyID (for example, using the access token to access the MyID Core API) this action will be audited as usual.

2.1 Use cases

You may want to use this feature for the following:

- Adding a direct link to your intranet, helpdesk, or other systems.
- Creating an email link to create an email with the recipient and subject filled in.
- Linking to custom pages that use the MyID Core API; you can pass the access token from the MyID Operator Client to your custom pages so your user does not have to log in again.
- Adding a direct link to a MyID report with pre-defined search criteria; for example, a list of requests pending approval.

You can control access to these external links using the **Edit Roles** workflow; for example, you can give your end users access to a helpline, and your operators access to an internal knowledge base.

You can include dynamic data in the external links; for example, you can pass the user's logon name to the external system so that it knows who is accessing it. You can also include an authentication token in the submission to the external link, allowing that system to authenticate to the MyID Core API or the MyID Client Service API.

To add or remove links, you use stored procedures in the MyID database, making the process quick and easy to use.

2.2 Adding a link

To add a link to an external site, you must run a stored procedure in the MyID database.

The syntax is:

```
EXEC sp_AddUILink
  @Name='[Operation Name]',
  @Href='[Operation Link]',
  @Icon='[Operation Icon]',
  @PassthroughAuth=[TRUE/FALSE];
```

where:

- `@Name` – the name of the link you want to add to the MyID Operator Client. This name is used to refer to the link if you want to remove it, and as its label on-screen and in the **Edit Roles** workflow. Must be unique.

  See section *2.3, Configuring access to a link* for details of using the **Edit Roles** workflow.
- `@Href` – the link you want to add. Provide a full URL; you can use any protocol supported by your browser, including `mailto:` links; for example:

  `https://myserver.example.com/kbase/`

  `mailto:support@mydomain.com?Subject=Request for support`

  You can also provide substitution codes that take information from the database and add it to the URL; see section *2.5, Providing substitution codes* for details.
- `@Icon` – the icon you want to use for the link.

  See section *2.6, Available icons* for a list of the icons you can use.
- `@PassthroughAuth` – whether MyID sends the current authentication token to the external site.

  Set to `TRUE` to send the authentication token, or `FALSE` not to send the token. This parameter is optional, and defaults to `FALSE` if you do not provide it.

  See section *2.7, Obtaining the authentication token* for details of working with passthrough authentication.

For example:

```
EXEC sp_AddUILink
  @Name='Knowledge Base',
  @Href='https://myserver.example.com/kbase/',
  @Icon='Launch',
  @PassthroughAuth=FALSE;
```

The script provides a report on its actions, including the name of the link, its ID, and the reference to use if you want to change the translation of the link text:

```
Operation added with name Knowledge Base and ID 310000
To allocate permissions, use the Edit Roles workflow. The operation will be
in the Links section with name Knowledge Base
To add translations for this operation, use the namespace
links.external.310000.desc
```

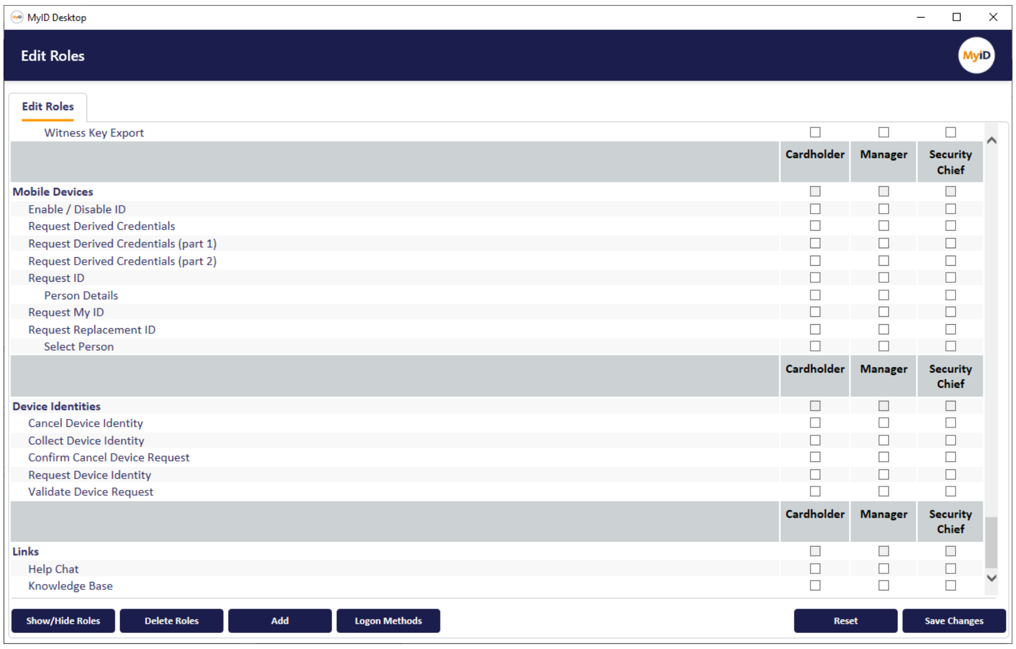
For information about translations, see section *2.8, Translating link text*.

2.3 Configuring access to a link

Access to links is controlled through the standard MyID **Edit Roles** workflow. By default, newly-added links are not available to any user; you must used **Edit Roles** to make them available to the people you want to be able to use them.

To configure access to a link:

1. In the MyID Operator Client, from the **More** category, select **Configuration Settings** then **Edit Roles**.
2. Scroll to the **Links** section.



	Cardholder	Manager	Security Chief
Witness Key Export	☐	☐	☐
	Cardholder	**Manager**	**Security Chief**
Mobile Devices	☐	☐	☐
Enable / Disable ID	☐	☐	☐
Request Derived Credentials	☐	☐	☐
Request Derived Credentials (part 1)	☐	☐	☐
Request Derived Credentials (part 2)	☐	☐	☐
Request ID	☐	☐	☐
Person Details	☐	☐	☐
Request My ID	☐	☐	☐
Request Replacement ID	☐	☐	☐
Select Person	☐	☐	☐
	Cardholder	**Manager**	**Security Chief**
Device Identities	☐	☐	☐
Cancel Device Identity	☐	☐	☐
Collect Device Identity	☐	☐	☐
Confirm Cancel Device Request	☐	☐	☐
Request Device Identity	☐	☐	☐
Validate Device Request	☐	☐	☐
	Cardholder	**Manager**	**Security Chief**
Links	☐	☐	☐
Help Chat	☐	☐	☐
Knowledge Base	☐	☐	☐

3. For each role you want to be able to access the link, select the option.

   You can use the **Show/Hide Roles** button to display the roles you want to work with.

   For more information about the **Edit Roles** workflow, see the *Administration Guide*.
4. Click **Save Changes**, then **Finish** to close the MyID Desktop window.
5. If you have made any changes to your own role, sign out and sign in again to see the links.

2.4 Removing a link

If you want to remove a link, you can use another stored procedure in the MyID database.

The syntax is:

```
EXEC sp_RemoveUILink
  @Name='[Operation Name]';
```

where:

- `@Name` – The name of the link you want to remove.

For example:

```
EXEC sp_RemoveUILink
  @Name='Knowledge Base';
```

The link is removed from the database, and any permissions associated with the link are also removed. If you subsequently add another link of the same name, you must set up permissions again.

2.5 Providing substitution codes

You can include in the link any content from the `vPeopleUserAccounts` view in the MyID database that relates to the logged-on user. Add the name of the field you want to use in double square brackets:

`[[field name]]`

and the value for the logged-on user is substituted when you click on the link.

For example:

```
EXEC sp_AddUILink
  @Name='User Query',
  @Href='https://myserver.example.com?user=[[LogonName]]',
  @Icon='Launch',
  @PassthroughAuth=FALSE;
```

In this example, the link is:

`https://myserver.example.com?user=[[LogonName]]`

If you are logged on with a `LogonName` of "Jane Smith", the link to the external website becomes:

`https://myserver.example.com/?user=Jane%20Smith`

You can parse the query string in your web page; for example:

```
<html>
  <head>
    <title>onload test</title>
    <script>
      function load() {
        const queryString = window.location.search;
        const urlParams = new URLSearchParams(queryString);
        const query = urlParams.get('user');
        document.getElementById("user").innerText = query;
      }
      window.onload = load;
    </script>
  </head>
  <body>
    <p>Query requested for <span id="user">Not Set</span>.</p>
  </body>
</html>
```

2.6 Available icons

You can use the following icons for the external links:

- `Launch`
- `Home`
- `CreditCard`
- `CardMembership`
- `VerifiedUser`
- `GetApp`
- `ListAlt`
- `Assessment`
- `Person`
- `Settings`
- `ContactMail`
- `MobileFriendly`
- `Laptop`
- `Chat`
- `Notifications`
- `Storage`

Launch	VerifiedUser
Home	GetApp
CreditCard	ListAlt
CardMembership	Assessment
Person	Laptop
Settings	Chat
ContactMail	Notifications
MobileFriendly	Storage

2.7 Obtaining the authentication token

If you are using passthrough authentication, MyID sends the current authentication token to the external web page. You can extract this access token and use it to provide authentication; for example, you can use it to call the MyID Core API with the credentials of the logged-on user.

Important: MyID passes the access token to an external page only if you are connecting through https.

To obtain the token, your external page must pass a message back to the opening page to say that it has loaded; your external page must then set up a listener to wait for the response that contains the token.

For example:

```
<html>
<head>
<script>
window.addEventListener("load", () => {
  window.opener.postMessage({loaded:true}, "*")
  document.getElementById("status").innerText = "loaded";
});
window.addEventListener("message", event => {
  document.getElementById("status").innerText = "message received - " +
new Date();
  if (event.data?.token) document.getElementById("token").innerText =
event.data.token;
});
</script>
</head>
<body>
Status: <span id="status">Not Set</span><br/>
Token: <span id="token">Not Set</span>
</body>
</html>
```

See the *Calling the API from an external system* section of the *MyID Core API* guide for more details about using the access token to call the API.

2.8 Translating link text

By default, the links use the name that you provide when you add them to the database. If you want to change the name of the link, or to provide alternative names in different languages, you can use the MyID translation system to do so.

When you add a link to the database, the stored procedure reports its namespace; for example:

```
To add translations for this operation, use the namespace
links.external.310000.desc
```

You can use this namespace code to add a string to the dictionary resource files.

For more information, see the Translating Resources guide in the Translation package. For information about obtaining this document, contact customer support quoting reference SUP-138.

3 Adding links to the configuration file

As an alternative to adding links to the database, you can edit a configuration file to add new links to the MyID Operator Client.

This method has the following differences:

- You do not have to set up role access to see the links; all links are automatically available to all users.
- You cannot control access to the links using roles.
- You cannot use substitution codes.
- You cannot provide translations for the links.

If you need to use substitution codes, provide different links to different users, or translate the links, you must add the external links to the database instead; see section 2, *Adding links to the database*.

3.1 Enabling external links

To enable external links, you must set the `MyID:LoadExtraApiLinks` option, which is stored in the `appSettings.json` file for the rest.core web service, to `true`. To ensure that the setting is not overwritten by subsequent updates to the MyID server, you are recommended to make this change to the `appSettings.Production.json` override file instead.

To enable external links:

1. Open the following file in a text editor:

   `appSettings.Production.json`

   This file is located in the following folder:

   `C:\Program Files\Intercede\MyID\rest.core\`

   If the file does not exist, create a new text file with that name.
2. Add the following information to the file:

```
{
  "MyID": {
    "LoadExtraApiLinks": true,
  }
}
```

3. Save the file.
4. In IIS, recycle the app pool used by the rest.core web service.

If you want to disable this feature, set the `MyID:LoadExtraApiLinks` option to `false`.

3.2 Adding a link

To add a link, you must create a file called `ExtraAPILinks.json` in the same folder as the `appSettings.Production.json` file for the rest.core web service, and provide the details for the link you want to add.

To add a link:

1. Open the following file in a text editor:

   `ExtraAPILinks.json`

   This file is located in the following folder:

   `C:\Program Files\Intercede\MyID\rest.core\`

   If the file does not exist, create a new text file with that name.

2. Add one or more links, using the following format:

   ```
   [
     {
       "op": "[operation ID]",
       "cat": "[type of link]",
       "desc": "[link description]",
       "entity": "[icon code]",
       "href": "[url]"
     },
   ]
   ```

   Each link has the following properties:

   - `op` – the operation ID. This must be a unique value.
   - `cat` – set this to one of the following:
     - `external` – the link is to an external website, but does not pass an access token.
     - `externalWithToken` – the link is to an external website, and will pass an access token.

     See section *2.7*, *Obtaining the authentication token* for details of obtaining access tokens.
   - `desc` – the label used for the link on screen.
   - `entity` – a code for the icon.

     See section *2.6*, *Available icons* for a list of the icons you can use.
   - `href` – the link you want to add.

     Provide a full URL; you can use any protocol supported by your browser, including `mailto:` links; for example:

     `https://myserver.example.com/kbase/`

     `mailto:support@mydomain.com?Subject=Request for support`

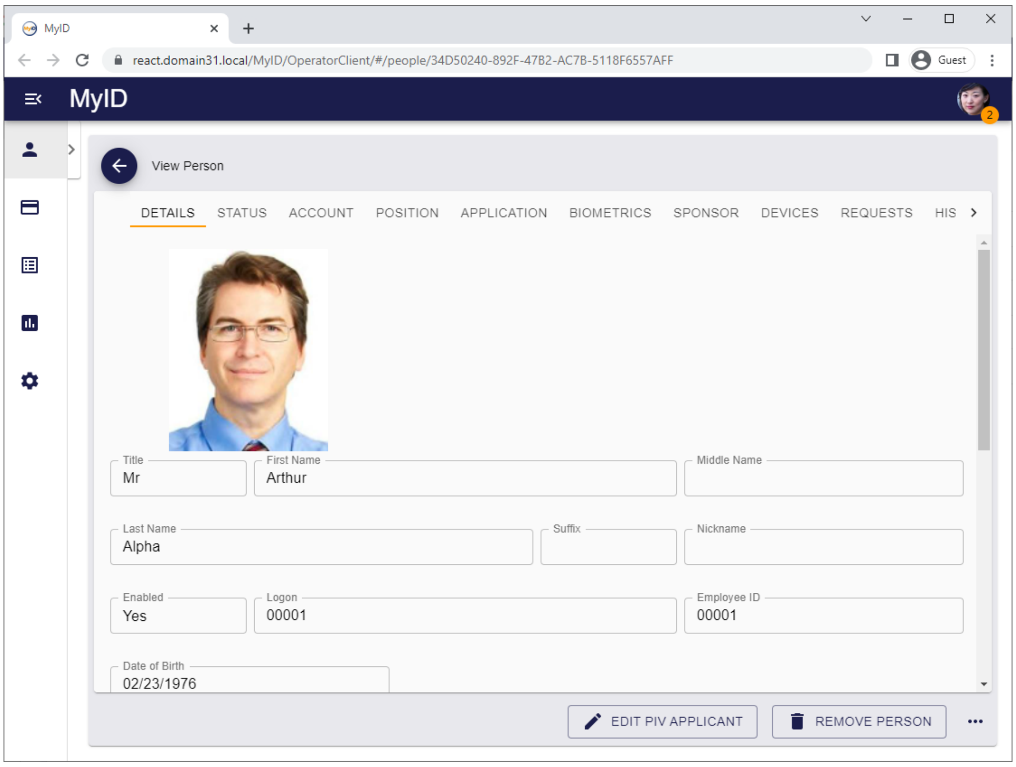
3. Save the file.

For example:

```
[
  {
    "op": "1",
    "cat": "external",
    "desc": "Knowledge Base",
    "entity": "Launch",
    "href": "https://myserver.example.com/kbase/"
  },
  {
    "op": "2",
    "cat": "externalWithToken",
    "desc": "Help Chat",
    "entity": "Chat",
    "href": "https://myserver.example.com/chat/"
  },
  {
    "op": "3",
    "cat": "external",
    "desc": "Email",
    "entity": "ContactMail",
    "href": "mailto:support@mydomain.com?Subject=Request for support"
  },
]
```

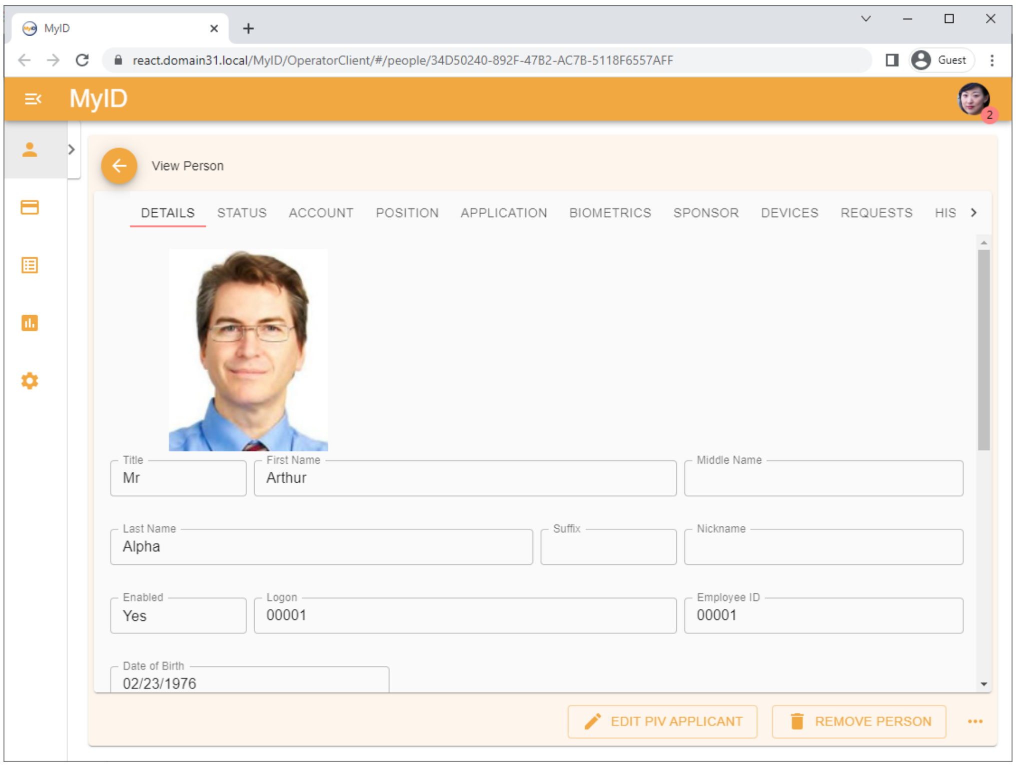
4 Customizing the theme

By default, the MyID Operator Client uses a blue and gray theme.



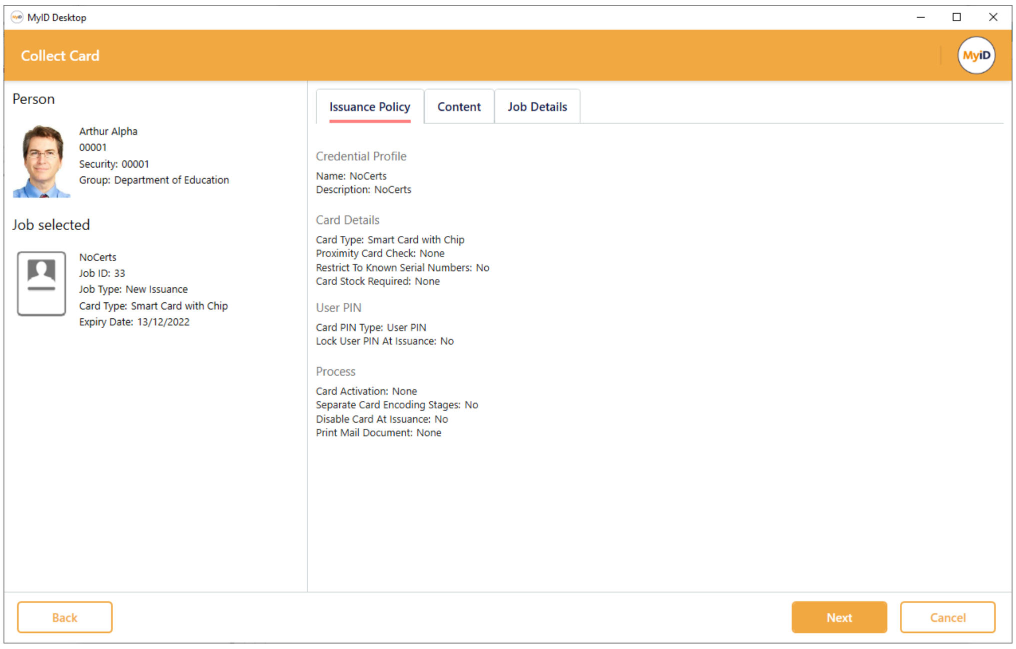
Title: Mr	First Name: Arthur	Middle Name:
Last Name: Alpha	Suffix:	Nickname:
Enabled: Yes	Logon: 00001	Employee ID: 00001
Date of Birth: 02/23/1976		

You can customize this theme to use whichever colors match your corporate identity; for example:



Title: Mr	First Name: Arthur	Middle Name:
Last Name: Alpha	Suffix:	Nickname:
Enabled: Yes	Logon: 00001	Employee ID: 00001
Date of Birth: 02/23/1976		

In addition, when you launch a workflow in MyID Desktop or the Self-Service App, the theme is passed to the application:



Person

Arthur Alpha
00001
Security: 00001
Group: Department of Education

Job selected

NoCerts
Job ID: 33
Job Type: New Issuance
Card Type: Smart Card with Chip
Expiry Date: 13/12/2022

Credential Profile
Name: NoCerts
Description: NoCerts

Card Details
Card Type: Smart Card with Chip
Proximity Card Check: None
Restrict To Known Serial Numbers: No
Card Stock Required: None

User PIN
Card PIN Type: User PIN
Lock User PIN At Issuance: No

Process
Card Activation: None
Separate Card Encoding Stages: No
Disable Card At Issuance: No
Print Mail Document: None

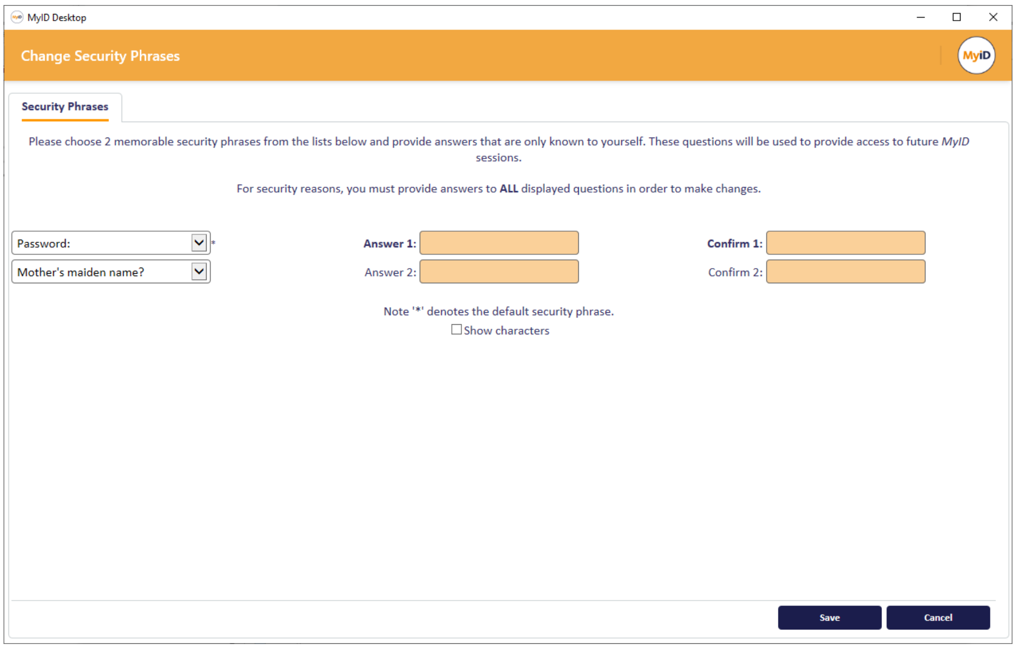
Note: You can apply a theme to the MyID Windows clients (MyID Desktop, the Self-Service App, the Self-Service Kiosk, and the MyID Client Service) locally on the client PC; you can also change the logos using this mechanism. See the *Customizing the MyID Windows Clients* guide for details.

4.1 Theme limitations

There are some limitations when working with themes.

4.1.1 Legacy workflows in MyID Desktop

Some workflows in MyID use legacy web-based technology; for these workflows, the outer MyID Desktop window uses the theme passed by the MyID Operator Client, but the buttons and other on-screen elements may retain their original colors:



Please choose 2 memorable security phrases from the lists below and provide answers that are only known to yourself. These questions will be used to provide access to future *MyID* sessions.

For security reasons, you must provide answers to **ALL** displayed questions in order to make changes.

Password: *	**Answer 1:**	**Confirm 1:**
Mother's maiden name?	Answer 2:	Confirm 2:

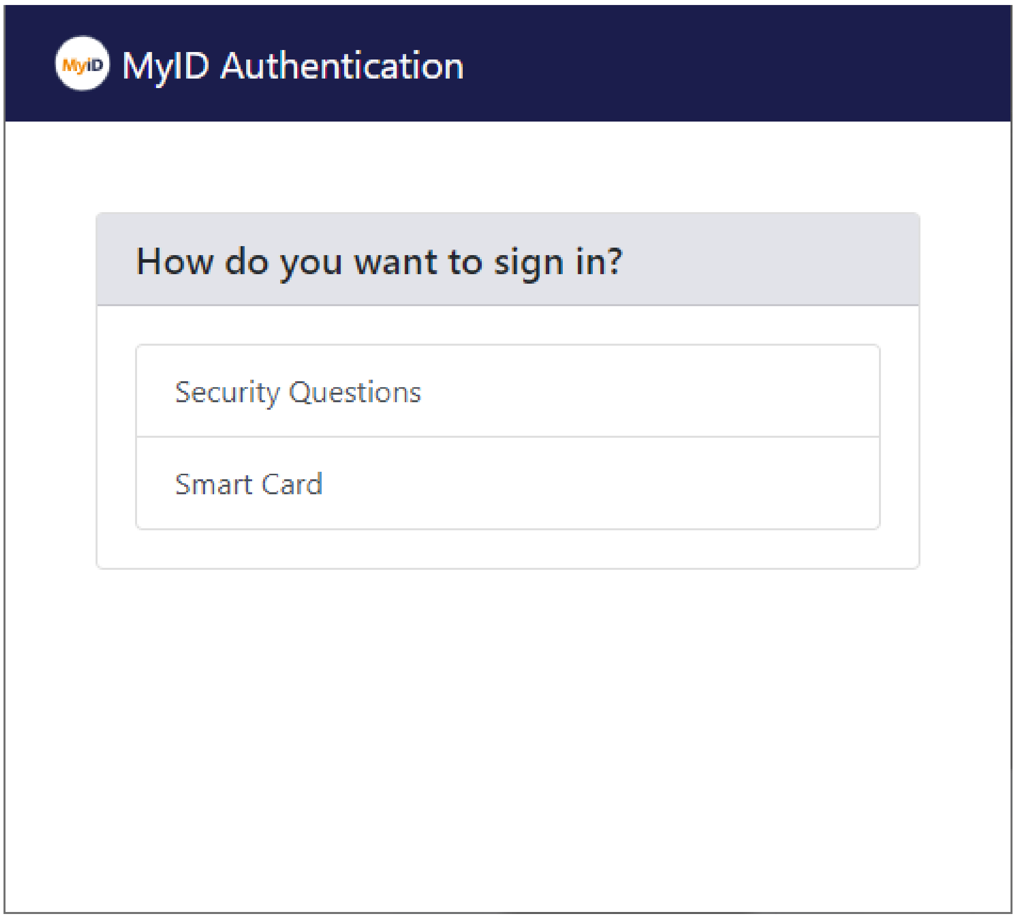
Note '*' denotes the default security phrase.

☐ Show characters

In the screenshot of the **Change Security Phrases** workflow above, the **Save** and **Cancel** buttons are blue instead of the orange specified by the theme; however, the title bar uses the setting from the theme.

4.1.2 Operator Client authentication

The authentication window for the MyID Operator Client does not currently support customizing the theme.



4.2 Setting the theme

The theme is controlled by the presence of a file called `theme.json` in the following folder on the MyID web server:

`C:\Program Files\Intercede\MyID\OperatorClient\custom\`

By default, this file does not exist, and the MyID Operator Client uses the default settings for the themes.

However, there are sample `theme.json` files provided in subfolders of the `custom` folder that you can use as a starting point for your own theme.

The format is as follows:

```json
{
  "palette": {
    "common": {
      "black": "rgba(0, 0, 0, 1)",
      "white": "rgba(255, 255, 255, 1)"
    },
    "background": {
      "paper": "rgba(255, 255, 255, 1)",
      "default": "rgba(250, 250, 250, 1)"
    },
    "primary": {
      "light": "rgba(76, 81, 111, 1)",
      "main": "rgba(27, 29, 76, 1)",
      "dark": "rgba(0, 0, 29, 1)",
      "contrastText": "rgba(255, 255, 255, 1)"
    },
    "secondary": {
      "light": "rgba(255, 202, 71, 1)",
      "main": "rgba(255, 153, 0, 1)",
      "dark": "rgba(198, 106, 0, 1)",
      "contrastText": "rgba(255, 255, 255, 1)"
    },
    "error": {
      "light": "rgba(229, 115, 115, 1)",
      "main": "rgba(244, 67, 54, 1)",
      "dark": "rgba(211, 47, 47, 1)",
      "contrastText": "rgba(255, 255, 255, 1)"
    },
    "text": {
      "primary": "rgba(0, 0, 0, 1)",
      "secondary": "rgba(115, 115, 115, 1)",
      "disabled": "rgba(0, 0, 125, 0.38)",
      "hint": "rgba(255, 0, 0, 0.3)"
    }
  }
}
```

For example:

- `"primary":"main"` is used for the title bar at the top of the screen, category text, buttons, and the background of the self-service menu.
- `"secondary":"main"` is used for the selection markers for tabs, selection markers for report items, and for the badge displaying the number of updates on the self-service menu.
- `"text":"primary"` is used for form names, tab names, and field contents.
- `"text":"secondary"` is used for field labels.

You can edit this file in any text editor, or use a variety of online tools to generate your own Material UI theme.

Note, however, that some theme editors output RGB hex color codes; for example:

```
"main":"#8080FF"
```

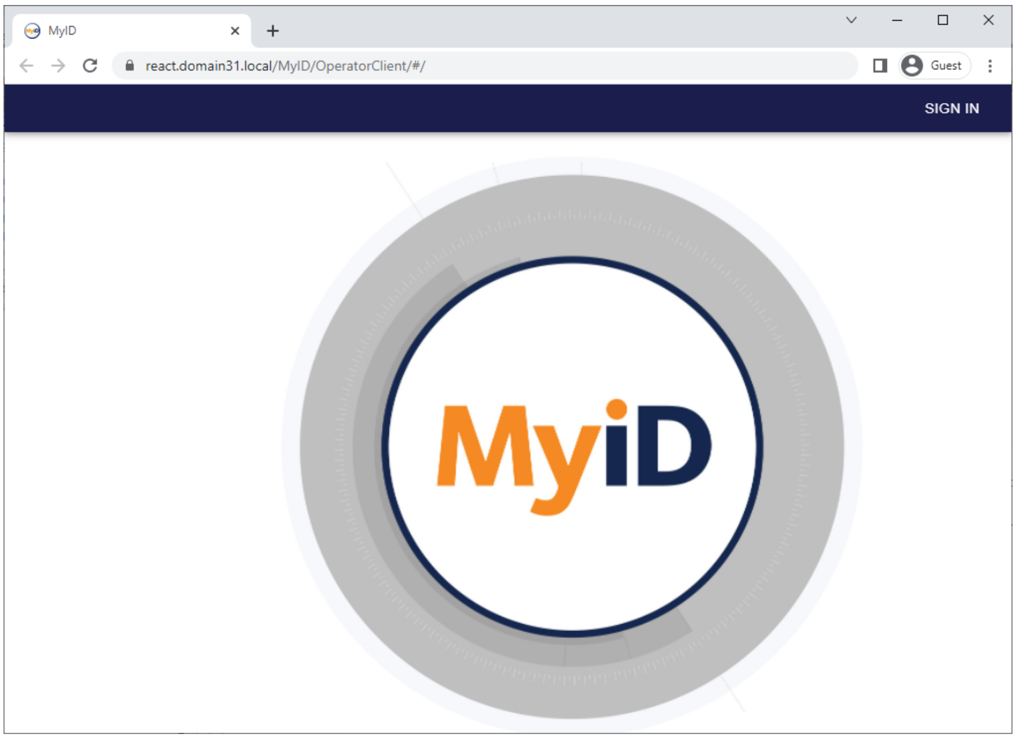
The MyID Operator Client requires RGBA color codes; for example:

```
"main":"rgba(128, 128, 255, 1)"
```

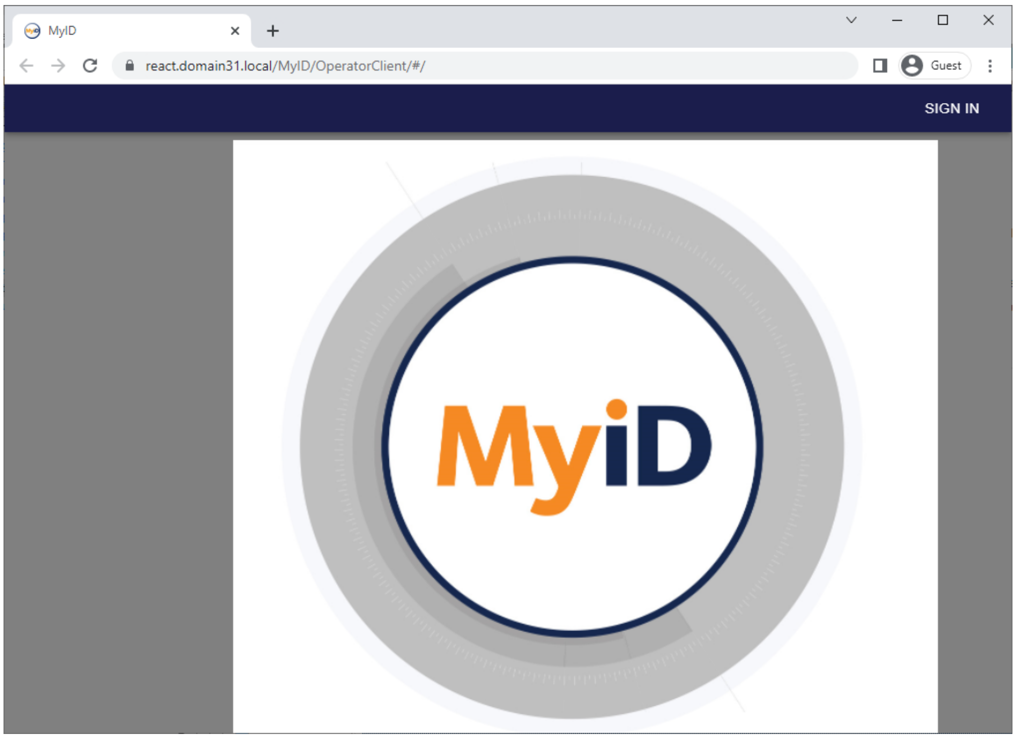
Therefore, you must check the output of any theme editing tools, and convert the RGB hex codes to RGBA if necessary.

4.2.1 Changing the MyID logo

The MyID logo is designed to work on a white background color.



If you change the `"background":"paper"` value, the logo may look out of place:



To remedy this, you can replace the logo with an edited image.

The logo file is `Welcome-BG.jpg` and is located in the following folder:

`C:\Program Files\Intercede\MyID\OperatorClient`

Make sure you replace the logo with an image of the same dimensions and format.

4.2.2 Adding a banner image

The banner area at the top of the screen (containing the **Sign In** link) is by default a solid color. You can use an image instead of a solid color.

To do so, create an image file called:

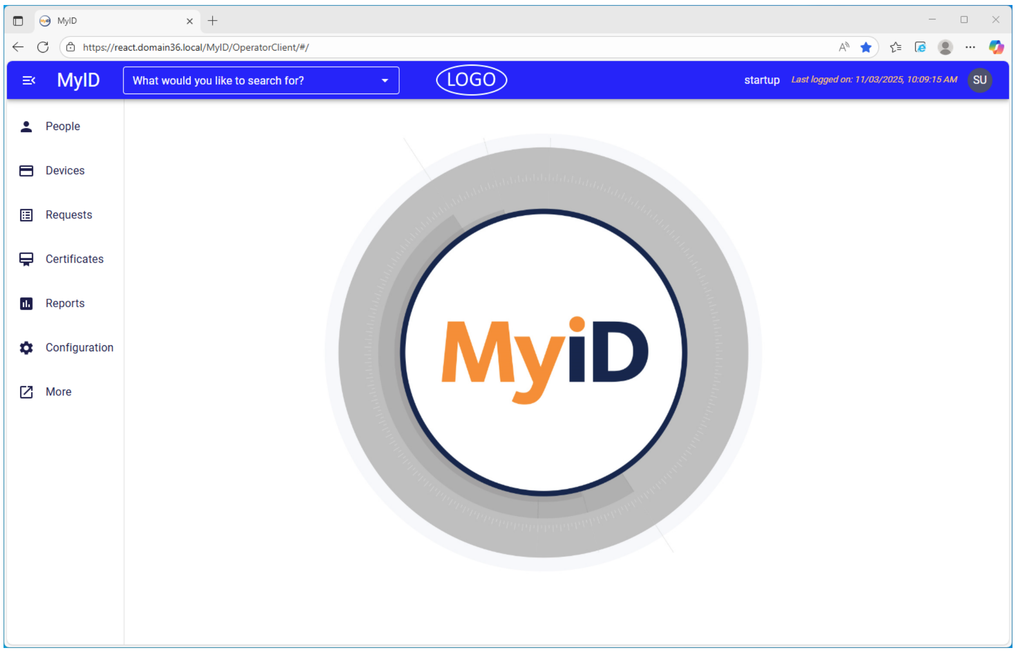
`Appbar-BG.png`

and place it in the following folder on the web server:

`C:\Program Files\Intercede\MyID\OperatorClient`

The banner area is 55 pixels high. If the image is too tall, it is cropped. If the image is too short, it is tiled vertically.

The banner area extends to the full width of the window. If the image is not wide enough, it is tiled horizontally. If you want to include your logo in the banner image, you are recommended leave a gap to the left of your logo so that your logo appears to the right of the search box. The recommended gap is 620 pixels.


MyID
https://react.domain36.local/MyID/OperatorClient/#/
MyID
What would you like to search for?
LOGO
startup
Last logged on: 11/03/2025, 10:09:15 AM
SU
People
Devices
Requests
Certificates
Reports
Configuration
More
MyID

You are recommended to create a banner image 55 pixels high and as wide as the widest window your clients are likely to use.

4.3 Troubleshooting issues with themes

If you have experience problems when attempting to apply a theme to the MyID Operator Client, try the following:

- If the MyID Operator Client does not use the theme, refresh the browser with CTRL+F5.
- Check the format of the `theme.json` file. Invalid theme files are ignored.
- Check that the color codes used are RGBA, and not RGB hex codes; that is, the theme file contains entries similar to:

  ```
  "main":"rgba(128, 128, 255, 1)"
  ```

  and not:

  ```
  "main":"#8080FF"
  ```

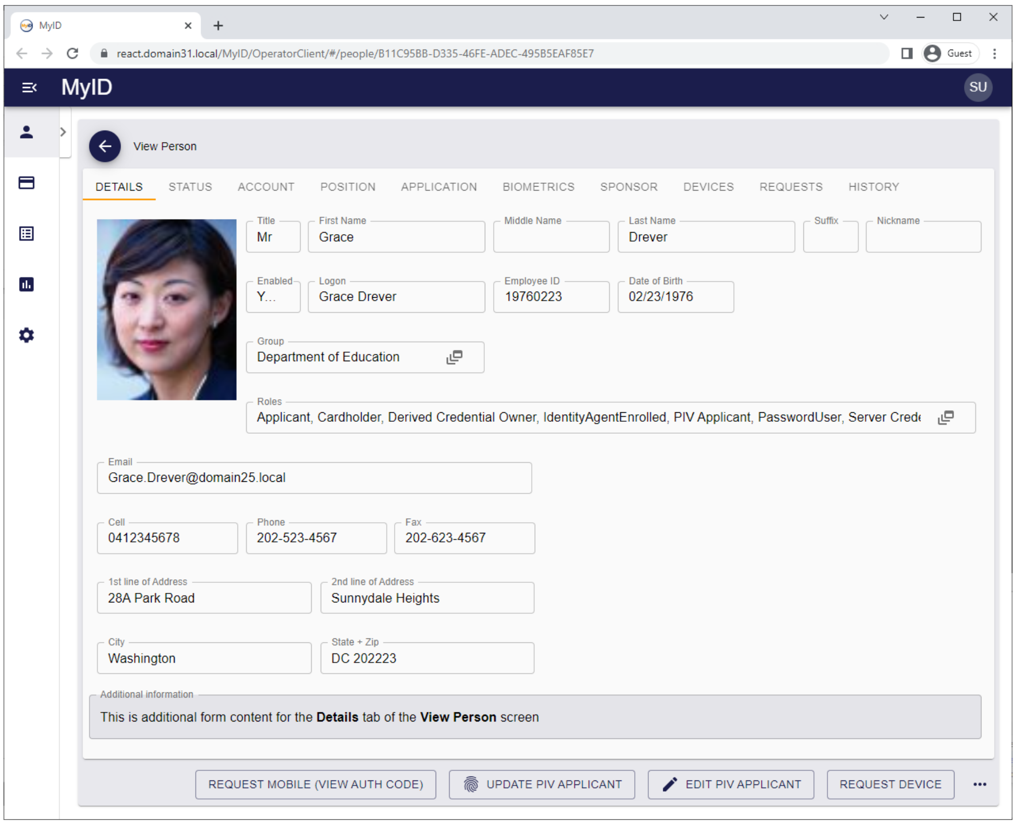
- If MyID Desktop or the Self-Service App do not use the themes applied to the MyID Operator Client, ensure that your client software is up to date, including the MyID Client Service. This feature was introduced with the client software provided with MyID 12.4:
  - MyID Desktop DSK-3.13.1000.1
  - MyID Client Service MCS-1.7.1000.1
  - Self-Service App SSP-3.13.1000.1
- The MyID Operator Client passes the theme to the MyID Client Service the first time it launches it. If you shut down the MyID Client Service then restart it, the MyID Operator Client does not pass the theme again, which means that MyID Desktop or the Self-Service App will not use the theme. Refresh the browser with CTRL+F5 and the MyID Operator Client will pass the theme to the MyID Client Service (and on to MyID Desktop or the Self-Service App) again.

5 Adding content to forms

You can add your own custom content to forms. This content can include HTML, CSS, and JavaScript, and is displayed in an **Additional Information** panel at the bottom of the form.

You can include any information from MyID that is available to the form (for example, details from other tabs) and you can pull additional information from external sources.

Note, however, that adding additional information to these forms does not allow you to store this information in the MyID database. If you want to add more information to MyID records, you must use Project Designer; contact your account manager for details.



Title: Mr
First Name: Grace
Middle Name:
Last Name: Drever
Suffix:
Nickname:
Enabled: Y...
Logon: Grace Drever
Employee ID: 19760223
Date of Birth: 02/23/1976
Group: Department of Education
Roles: Applicant, Cardholder, Derived Credential Owner, IdentityAgentEnrolled, PIV Applicant, PasswordUser, Server Crede
Email: Grace.Drever@domain25.local
Cell: 0412345678
Phone: 202-523-4567
Fax: 202-623-4567
1st line of Address: 28A Park Road
2nd line of Address: Sunnydale Heights
City: Washington
State + Zip: DC 202223
Additional information: This is additional form content for the **Details** tab of the **View Person** screen

5.1 Working with the custom hooks file

You can control the customization of the forms within the MyID Operator Client using a custom hooks file.

The hooks file does not exist by default; you must create it yourself. Alternatively, you can use the example file as a basis for your own customizations; see section *5.3*, *Example custom hooks file*.

The filename is:

```
hooks.js
```

Copy the file into the following folder:

```
C:\Program Files\Intercede\MyID\OperatorClient\custom
```

5.1.1 The loadHook function

This JavaScript file must contain a function, the syntax of which is:

```
function loadHook(op, values)
```

where:

- `op` – the ID of the current operation.
- `values` – a block of JSON containing all the available values from the form.

The MyID Operator Client calls this function when it opens the form. Edit this function to return a block of JSON containing the HTML, CSS, and JavaScript you want to include on your customized form. You use the same function for every tab on every form; you must include the identifier for the tabs you want to customize within the function.

For example:

```
function loadHook(op, values) {
  return {
    "additionalHtml": {
      "forms.people.viewperson.details":
      "This is the <b>Details</b> tab",
      "forms.people.viewperson.status":
      "This is the <b>Status</b> tab"
      }
    };
}
```

This example returns the following JSON:

```
{
    "additionalHtml": {
        "forms.people.viewperson.details": "This is the <b>Details</b> tab",
        "forms.people.viewperson.status": "This is the <b>Status</b> tab"
    }
}
```

The MyID Operator Client uses the tab identifiers to display the content in the appropriate place.

For details of how to determine the tab identifiers you want to use, see section *5.2*, *Finding data references*.

5.1.2 Working with values

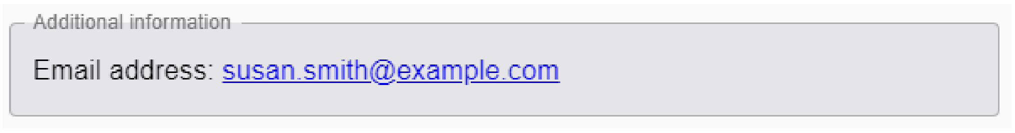
You can use information from the values passed in to the `loadHook` function.

To determine what values are available, see section *5.2.2*, *Logging data elements to the browser console*.

For example, if you wanted to add a link to the **Details** page of the View Person screen that you could click to email the person, you could add a reference to `values.Email` to the `hooks.js` file:

```
function loadHook(op, values) {
  return {
    "additionalHtml": {
      "forms.people.viewperson.details":
      "Email address: <a href='mailto:" + values.Email + "'>" + values.Email
+ "</a>"
      }
    };
}
```

Note: This is a simplified example. You are strongly recommended to escape any values you add to the form to prevent attacks; you can use the sample escape function provided in the example file; see section *5.3.3*, *Escaping values*.



Email address: susan.smith@example.com

5.1.3 Adding content

You can add HTML, CSS, and JavaScript; whatever you provide in the return JSON is used as the content for a `div` within the **Additional Information** area of the appropriate tab of the appropriate form. This content can also access any additional JavaScript functions that you include in the `hooks.js` file.

For example:

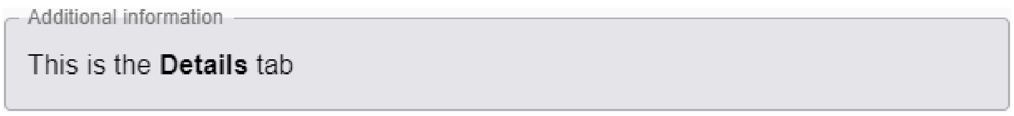
```
function loadHook(op, values) {
  return {
    "additionalHtml": {
      "forms.people.viewperson.details":
      "<style type='text/css'> .Label {font-weight: bold;} </style>" +
      "This is the <span class='Label' onclick=popupAlert();>Details</span>
tab",
      "forms.people.viewperson.status":
      "This is the <b>Status</b> tab"
      }
    };
}

function popupAlert() {
  alert('This is a test.');
}
```

which produces the following content on the form:

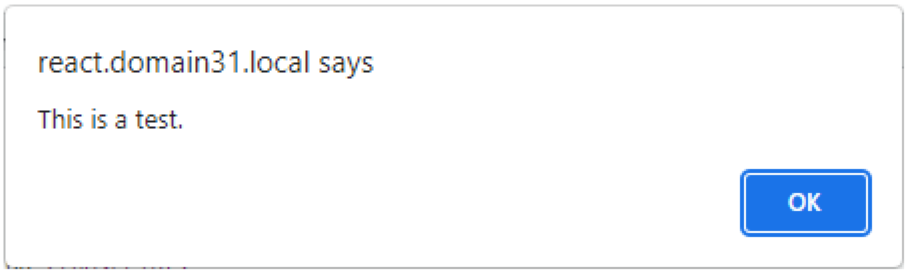
```
<div id="forms.people.viewperson.details"><style type="text/css"> .Label
{font-weight: bold;} </style>This is the
<span class="Label" onclick="popupAlert();">Details</span> tab</div>
```

This produces the following display:


Additional information

This is the **Details** tab

When you click the **Details** text, the `onclick` event calls the `popupAlert()` function.


react.domain31.local says

This is a test.

5.2 Finding data references

To work with the custom hooks file, you must know the reference for the tab on the form you want to customize.

Note: You can customize data form tabs (that is, tabs with data entry forms; for example, the **Details** tab); you cannot customize report tabs (that is, tabs with a list of items; for example, the **Devices** tab).

For example:

Screen	Tab	Reference
View Request	Request	`forms.requests.viewrequest.request`
View Audit	Audit	`forms.audits.viewaudit.audit`
View Device	Details	`forms.devices.viewdevice.details`
View Person	Details	`forms.people.viewperson.details`
	Status	`forms.people.viewperson.status`
	Account	`forms.people.viewperson.account`
	Position	`forms.people.viewperson.position`
	Application	`forms.people.viewperson.application`
	Biometrics	`forms.people.viewperson.biometrics`
	Sponsor	`forms.people.viewperson.sponsor`
Edit Person	Details	`forms.people.editperson.details`
	Account	`forms.people.editperson.account`
Edit PIV Applicant	Details	`forms.people.editpivapplicant.details`
	Status	`forms.people.editpivapplicant.status`
	Account	`forms.people.editpivapplicant.account`
	Position	`forms.people.editpivapplicant.position`
	Sponsor	`forms.people.editpivapplicant.sponsor`
	Application	`forms.people.editpivapplicant.application`
	Biometrics	`forms.people.editpivapplicant.biometrics`

The above table includes screens and tabs that are available only on PIV systems, and is an example only.

This section provides instructions for finding the references for the tabs on your system.

If you want to access any data from the form, you must also know the reference for the data element; for example:

Screen	Tab	Field	Reference
View Person	Details	Title	`Title`
		First Name	`FirstName`
		Middle Name	`Initial`
		Last Name	`Surname`
		Suffix	`XuPIV4`
		Nickname	`Xu49`

The above table includes fields that are available only on PIV systems, and is an example only.

This section provides instructions for finding the references for the fields on your system.

5.2.1 Viewing the response from the API

You can obtain a JSON data structure containing all the information you need by viewing the response to the forms API call; for example, for View Person:

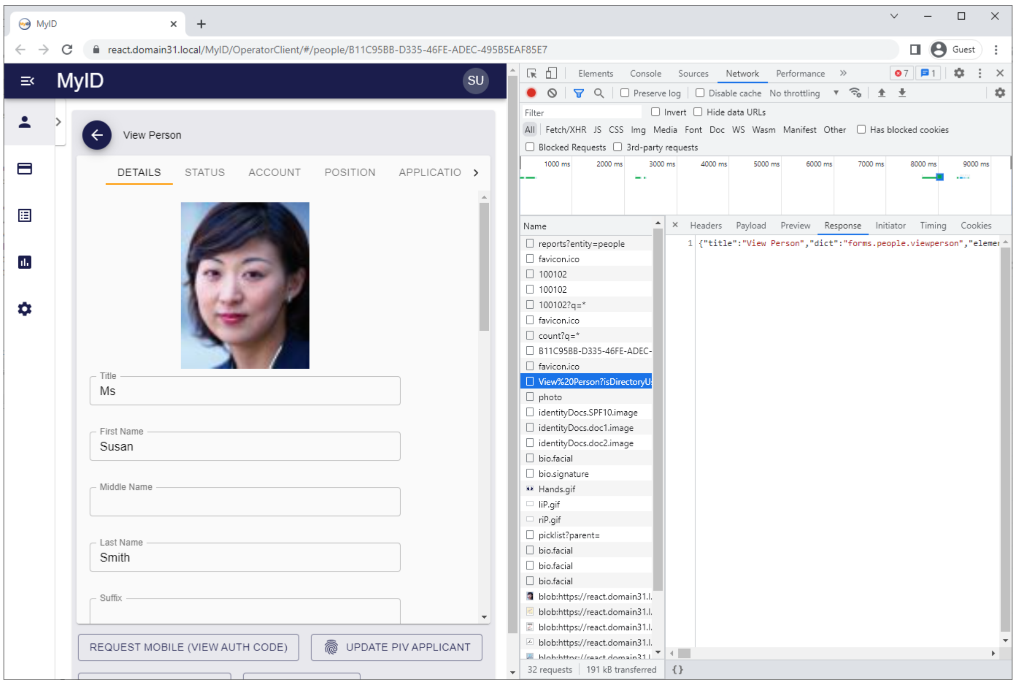
`rest.core/api/forms/View%20Person`

1. Open a MyID Operator Client window in your browser.
2. Open the browser's network log.

   For example, in Chrome, press F12, then select the **Network** tab.
3. Log in to the MyID Operator Client.

   Note: The response from the API is returned the first time you open the form, so you are recommended to start a new session.
4. Open the form you want to customize.

   For example, search for a person, then open the View Person form.
5. In the network log, locate the `/api/forms` call to the API, then open the Response.



```
1 {"title":"View Person","dict":"forms.people.viewperson","elemer
```

The response is a block of JSON that contains all of the elements available on the form.

You are recommended to use a JSON formatter to make the data easier to read.

To find the ID of a tab, look for the relevant `dict` attribute. For example:

```
"label":"Details",
"dict":"forms.people.viewperson.details",
```

This shows that the ID of the **Details** tab on the View Person form is:

`forms.people.viewperson.details`

To find the ID of a field on the form, look for the relevant `name` attribute. For example:

```
"field":{
  "name":"Email",
  "component":"inputBox",
  "type":"text",
  "label":"Email",
  ...
  }
```

This shows that the ID of the **Email** field on the form is:

```
Email
```

You can access this in the custom area using:

```
values.Email
```

Note: Extended attributes use codes such as `Xu32` which may not be immediately obvious. The `label` element helps you match the reference to the on-screen display. You can also search the *Lifecycle API* guide in the MyID documentation set for assistance, particularly for PIV attributes. In addition, some extended attributes may have been added during the customization of your system.

5.2.2 Logging data elements to the browser console

To determine what data references are available, you can also write the data elements to the browser console. This method does not provide the references for the tabs, but does provide a simpler list of the data elements, and shows you the current values for each of those data elements.

1. Create a `hooks.js` file with the following content:

   ```
   function loadHook(op, values) {
     console.log(values);
   }
   ```

   Note: You can add the console statement to a `hooks.js` file that already contains additional statements; make sure the console statement is the first line within the `loadHook` function.

2. Copy this file into the following folder on the MyID web server:

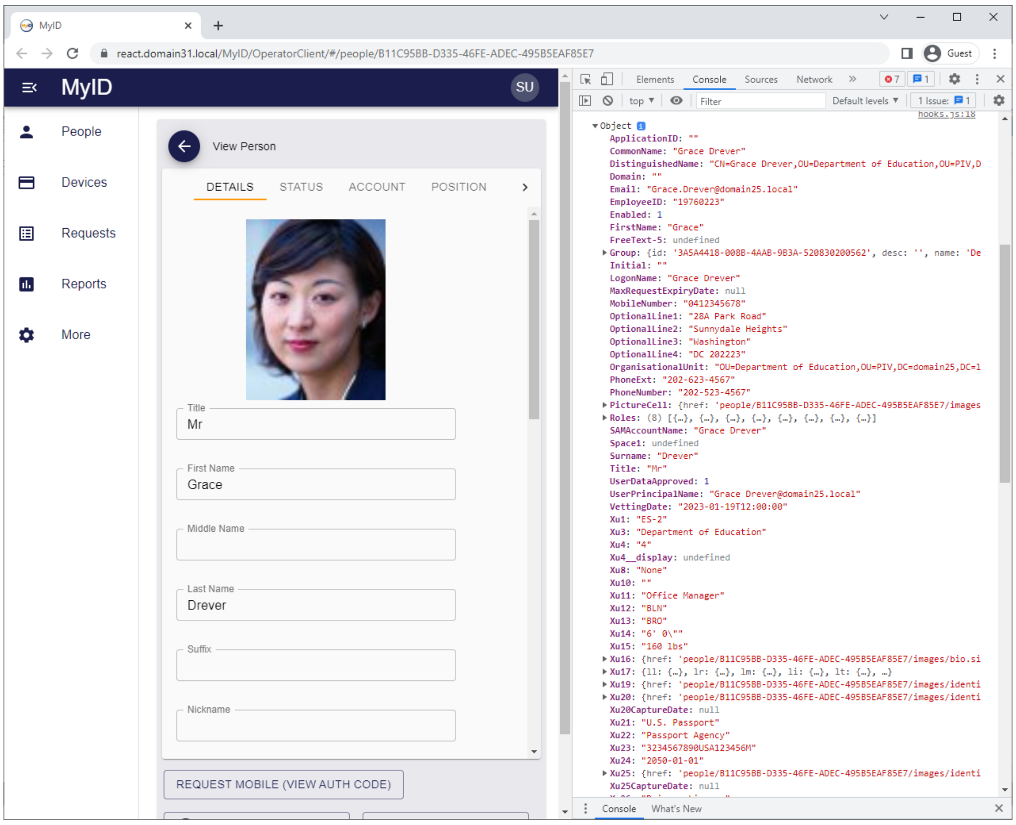
   `C:\Program Files\Intercede\MyID\OperatorClient\custom`

3. Open a MyID Operator Client window in your browser, and navigate to the screen you want to customize.

   For example, open the View Person screen.

4. Open the browser console.

   For example, in Chrome, press F12, then select the **Console** tab.



```
▼Object
  ApplicationID: ""
  CommonName: "Grace Drever"
  DistinguishedName: "CN=Grace Drever,OU=Department of Education,OU=PIV,D
  Domain: ""
  Email: "Grace.Drever@domain25.local"
  EmployeeID: "19760223"
  Enabled: 1
  FirstName: "Grace"
  FreeText-5: undefined
 ▶Group: {id: '3A5A4418-008B-4AAB-9B3A-520830200562', desc: '', name: 'De
  Initial: ""
  LogonName: "Grace Drever"
  MaxRequestExpiryDate: null
  MobileNumber: "0412345678"
  OptionalLine1: "28A Park Road"
  OptionalLine2: "Sunnydale Heights"
  OptionalLine3: "Washington"
  OptionalLine4: "DC 202223"
  OrganisationalUnit: "OU=Department of Education,OU=PIV,DC=domain25,DC=l
  PhoneExt: "202-623-4567"
  PhoneNumber: "202-523-4567"
 ▶PictureCell: {href: 'people/B11C95BB-D335-46FE-ADEC-495B5EAF85E7/images
 ▶Roles: (8) [{…}, {…}, {…}, {…}, {…}, {…}, {…}, {…}]
  SAMAccountName: "Grace Drever"
  Space1: undefined
  Surname: "Drever"
  Title: "Mr"
  UserDataApproved: 1
  UserPrincipalName: "Grace Drever@domain25.local"
  VettingDate: "2023-01-19T12:00:00"
  Xu1: "ES-2"
  Xu3: "Department of Education"
  Xu4: "4"
  Xu4__display: undefined
  Xu8: "None"
  Xu10: ""
  Xu11: "Office Manager"
  Xu12: "BLN"
  Xu13: "BRO"
  Xu14: "6' 0\""
  Xu15: "160 lbs"
 ▶Xu16: {href: 'people/B11C95BB-D335-46FE-ADEC-495B5EAF85E7/images/bio.si
 ▶Xu17: {ll: {…}, lr: {…}, lm: {…}, li: {…}, lt: {…}, …}
 ▶Xu19: {href: 'people/B11C95BB-D335-46FE-ADEC-495B5EAF85E7/images/identi
 ▶Xu20: {href: 'people/B11C95BB-D335-46FE-ADEC-495B5EAF85E7/images/identi
  Xu20CaptureDate: null
  Xu21: "U.S. Passport"
  Xu22: "Passport Agency"
  Xu23: "323456789OUSA123456M"
  Xu24: "2050-01-01"
 ▶Xu25: {href: 'people/B11C95BB-D335-46FE-ADEC-495B5EAF85E7/images/identi
  Xu25CaptureDate: null
```

The console lists all of the data elements available on the form and their current values.

5.3 Example custom hooks file

The MyID Integration Toolkit contains a sample `hooks.js` file that you can use as the basis of your own customizations. The MyID Integration Toolkit is available on the Intercede Customer Portal:

forums.intercede.com/documentation/

5.3.1 Cascading style sheet

The sample file contains the following function that allows you to add a simple style sheet to your customizations:

```
addStyle()
```

5.3.2 Adding elements

The sample file contains several functions that make it easy to add elements to your customizations. For example:

```
addTextBoxWith({ id, value, disabled })
```

This function adds a text box with a particular `id` and `value`, and can be enabled or disabled.

5.3.3 Escaping values

The `EscapeXML` function in the example file prevents special characters from being incorporated in your custom area and potentially providing a vector to attack your system. You are recommended to use this function to escape any values you include.

The function escapes the following characters:

```
& < > ' "
```

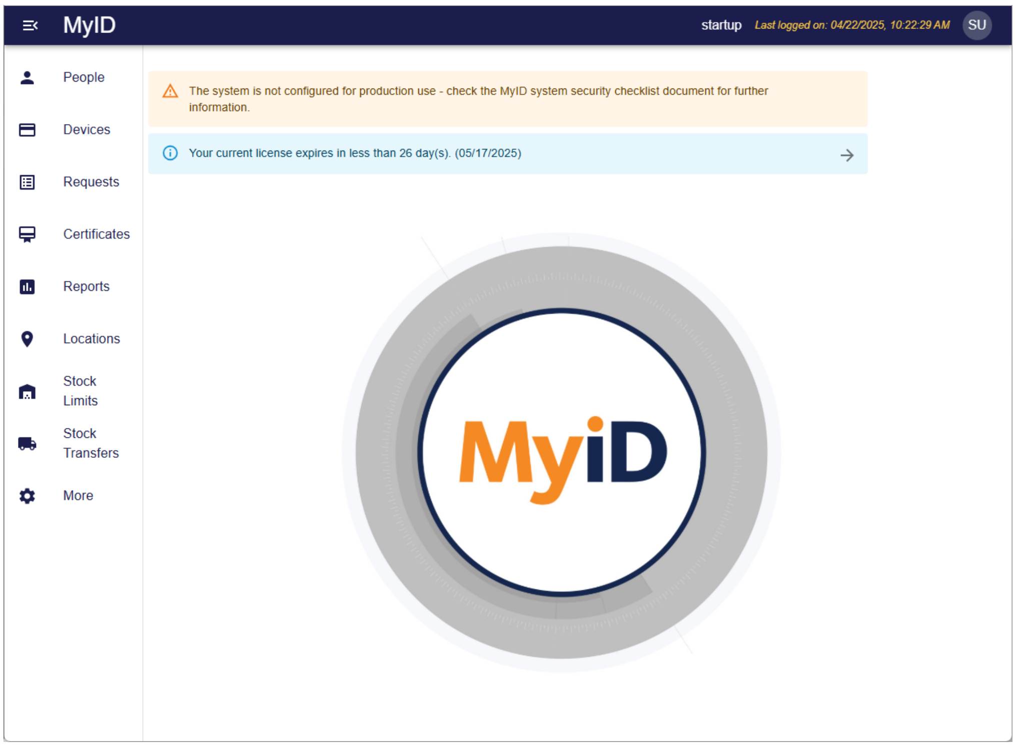
For example:

```
function loadHook(op, values) {
  return {
    additionalHtml: {
      "forms.people.viewperson.details":
      "Email address: <a href='mailto:" + escapeXML(values.Email) + "'>" +
escapeXML(values.Email) + "</a>"
      }
    };
}

function escapeXML(input) {
  if (input) {
    return input
      .replace(/&(?!#|amp;)/g, "&amp;")
      .replace(/</g, "&lt;")
      .replace(/>/g, "&gt;")
      .replace(/'/g, "&apos;")
      .replace(/"/g, "&quot;");
  }
  return "";
}
```

6 Customizing logon messages

When you log in to the MyID Operator Client, the system may display the following messages:



The system is not configured for production use - check the MyID system security checklist document for further information.

Your current license expires in less than 26 day(s). (05/17/2025)

- A warning that your system is not securely configured; for example, you have not set up customer GlobalPlatform keys and random Security Officer PINs (SOPINs).

  See the *Securing Devices* section in the *System Security Checklist* guide for details.
- A notification that your license is due to expire or has expired.

  If you have access to the **Licensing** workflow, you can click the arrow on the message to launch the workflow in MyID Desktop.

  See the *License management* section in the *Administration Guide* for details.

You can customize these messages, or add new messages to the logon screen.

You can:

- Customize the security configuration and licensing messages using the translation mechanism.

  See section *6.1*, *Customizing the security and licensing messages*.
- Add new warning or information messages to the logon screen.

  See section *6.2*, *Adding custom messages to the logon screen*.

6.1 Customizing the security and licensing messages

You can customize the security and licensing messages that appear on the logon screen of the MyID Operator Client using the translation mechanism.

You are recommended to copy the dictionary entries from the Base dictionary file into the CustomerTerms dictionary file and make your translation changes there. For more information about translating the dictionaries for the MyID Operator Client, see the *Translating Resources* guide in the MyID CMS translation toolkit.

6.1.1 The system is not configured for production use

The security warning has the default text:

```
The system is not configured for production use - check the MyID system
security checklist document for further information.
```

To edit this message, find the dictionary entry with the following ID in the Base `.resx` file for the appropriate language:

```
systemMessages.insecureProductionEnvironment.message
```

6.1.2 The license is expiring

The license expiring message has the default text:

```
Your current license expires in less than {expiryDays} day(s).
({expiryDate})
```

where:

- `{expiryDays}` is a placeholder for the number of days until the license expires.
- `{expiryDate}` is a placeholder for the license expiry date.

To edit this message, find the dictionary entry with the following ID in the Base `.resx` file for the appropriate language:

```
systemMessages.licenceAboutToExpire.message
```

6.1.3 The license has expired

The license expired message has the default text:

```
Your current license has expired.
```

To edit this message, find the dictionary entry with the following ID in the Base `.resx` file for the appropriate language:

```
systemMessages.licenceExpired.message
```

6.2 Adding custom messages to the logon screen

You can create custom warnings and information messages that are displayed on the logon screen.

Warning: Back up your database before making any changes, and make your changes on a test server before implementing them on your production server. Editing stored procedures in the MyID database may prevent you from accessing MyID CMS through the MyID Operator Client if you make a mistake.

6.2.1 Adding the messages to the database

To add a warning or information message, you must edit the `sp_GetLogonMessagesCustom` stored procedure in the MyID database:

1. On the MyID CMS database server, in SQL Server Management Studio, expand **Databases > MyID > Programmability > Stored Procedures**.
2. Right-click `sp_GetLogonMessagesCustom` and from the pop-up menu select **Modify**.

   A window opens containing the stored procedure.

```
USE [MyID]
GO
/****** Object:  StoredProcedure [dbo].[sp_
GetLogonMessagesCustom]    Script Date: 23/04/2025 07:54:58 ******/
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
ALTER   PROCEDURE [dbo].[sp_GetLogonMessagesCustom]
                        @LogonName nvarchar(260),
                        @LogonMechanism int,
                        @xml nvarchar(4000) OUTPUT AS
                        BEGIN
                            set @xml = ''
                        END
```

3. Edit the following line to contain the XML for your warnings or information messages:

```
set @xml = ''
```

   See section *6.2.2*, *XML format for custom messages* for details.

For example:

```
set @xml ='<root>
  <warning>
    <message>Custom Warning Message</message>
    <translation>customMessage.Message1.message</translation>
  </warning>
  <info>
    <message>Custom Information Message</message>
    <translation>customMessage.Message2.message</translation>
  </info>
  </root>'
```

4. Click **Execute** to update the stored procedure in the database.

Rather than providing the XML for the warnings or information messages directly, if required you can write a more sophisticated procedure that uses the parameters passed in to the stored procedure:

- `@LogonName` – the logon name of the logged-in operator. You can use this to tailor the message to the recipient.
- `@LogonMechanism` – the ID of the method used to log in; for example, password or smart card. You can find a list of the logon mechanism IDs in the `LogonMechanisms` table in the MyID CMS database.

You can also query the MyID CMS database to check its status before building the XML containing the messages; for example, you may want to set a flag in custom table with a maintenance shutdown time; you can then check this flag in the stored procedure, and display a message to your operators that the system is shutting down soon. You could display this as an info message if the maintenance window is within two days, and change this to a warning if the maintenance window is within six hours. (Note that the messages are displayed only at logon, so in this case you are recommended to provide plenty of notice.)

Creation of such stored procedures is beyond the scope of this guide; consult your DBA for advice. In particular, you must make sure that any queries you make to the database are efficient; for example, an unindexed lookup on a large table may impact your system performance.

Note: If you add a custom message, MyID CMS no longer displays the security warning. If you want to include the security warning in addition to custom messages, you must make more complicated changes to the `sp_GetLogonMessagesCustom` stored procedure; see section *6.2.3*, *Allowing security messages and custom messages*. The license messages are not affected by adding custom messages.

6.2.2 XML format for custom messages

The XML contains an outer `<root>` node.

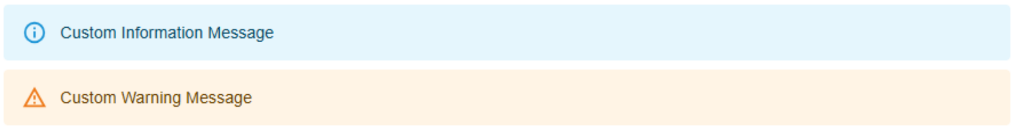
Within the `<root>` node, you can include one or more `<warning>` or `<info>` nodes.

Each `<warning>` or `<info>` node contains the message you want to display in a `<message>` node and optionally a `<translation>` node that contains the ID of a dictionary entry in the rest.core translation file. If you do not provide a `<translation>` node, the text in the `<message>` node is used.

For example:

```
<root>
  <warning>
    <message>Custom Warning Message</message>
    <translation>customMessage.Message1.message</translation>
  </warning>
  <info>
    <message>Custom Information Message</message>
    <translation>customMessage.Message2.message</translation>
  </info>
</root>
```

which produces the following messages on the logon screen:



Custom Information Message

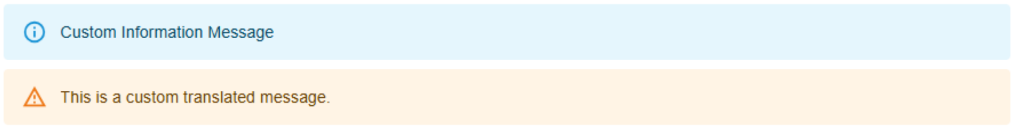
Custom Warning Message

If you add a translation to the `.resx` file for the appropriate language and rebuild the dictionaries, this is used instead of the text in the `<message>` node.

For example, if you include the following in the `CustomerTerms.en-US.resx` file:

```
<data name="customMessage.Message1.message" xml:space="preserve">
  <value>This is a custom translated message.</value>
</data>
```

this appears on a browser using US English as:



Custom Information Message

This is a custom translated message.

For more information about translating the dictionaries for the MyID Operator Client, see the *Translating Resources* guide in the MyID CMS translation toolkit.

6.2.3 Allowing security messages and custom messages

If the main `sp_GetLogonMessages` stored procedure receives any custom messages from the `sp_GetLogonMessagesCustom` stored procedure, it uses those in preference to its own messages, including the security warning. Accordingly, if you want to include both custom messages and the security warning, you must edit the `sp_GetLogonMessagesCustom` stored procedure to contain the messages from the main `sp_GetLogonMessages` stored procedure.

Important: Future releases of MyID CMS may provide updates to the `sp_GetLogonMessages` stored procedure. You must ensure that your own custom stored procedure continues to incorporate all of the messages generated by the main stored procedure.

To edit the stored procedure:

1. On the MyID CMS database server, in SQL Server Management Studio, expand **Databases > MyID > Programmability > Stored Procedures**.
2. Right-click `sp_GetLogonMessages` and from the pop-up menu select **Modify**.

   A window opens containing the main message stored procedure.
3. Copy everything in the `sp_GetLogonMessages` window from the following line:

   ```
   set @xml = '<root>'
   ```

   to:

   ```
   set @xml = @xml + '</status></root>'
   ```

   (Include both of these lines.)
4. Right-click `sp_GetLogonMessagesCustom` and from the pop-up menu select **Modify**.

   A window opens containing the custom message stored procedure.
5. Paste the copied block of code into the `sp_GetLogonMessagesCustom` window, replacing the following line:

   ```
   set @xml = ''
   ```
6. In the `sp_GetLogonMessagesCustom` window, edit the following line:

   ```
   set @xml = @xml + '</status></root>'
   ```

   to remove the final `</root>` node, as follows:

   ```
   set @xml = @xml + '</status>'
   ```

7. Immediately after this line, add the following:

```
set @xml = @xml + ''
set @xml = @xml + '</root>'
```

8. Edit the following line to include your message XML:

```
set @xml = @xml + ''
```

See section *6.2.2*, *XML format for custom messages* for details.

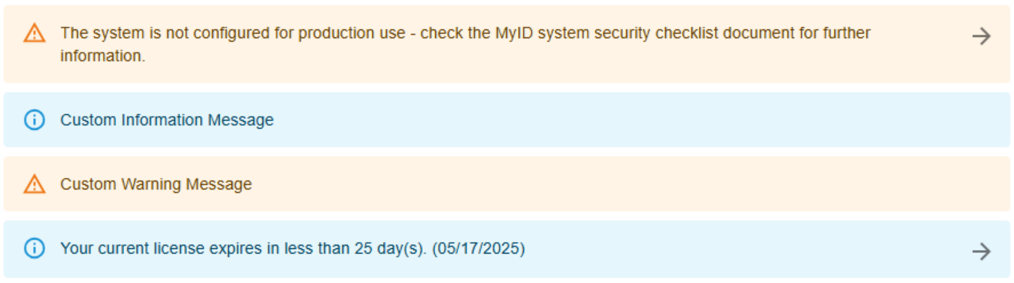
Important: Do *not* include the `<root>` node, as this is already created by the stored procedure; you must add only the additional `<warning>` or `<info>` nodes that you want to include.

For example:

```
set @xml = @xml + '</status>'
set @xml = @xml + '<warning>
    <message>Custom Warning Message</message>
    <translation>customMessage.Message1.message</translation>
  </warning>
  <info>
    <message>Custom Information Message</message>
    <translation>customMessage.Message2.message</translation>
  </info>'
set @xml = @xml + '</root>'
```

9. Click **Execute** to update the stored procedure in the database.

The logon screen now displays the security message (if appropriate), the custom warnings and information you added, and the license message (if appropriate).


The system is not configured for production use - check the MyID system security checklist document for further information.

Custom Information Message

Custom Warning Message

Your current license expires in less than 25 day(s). (05/17/2025)