



YODLEE CUSTOMERCARE DRAFT

DEPLOYMENT GUIDE

VERSION 8.0.2

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1 INTRODUCTION

Yodlee CustomerCare tool is a Web application that is used by financial institutions to provide its customers, customer care support for all our application and CRM functionality for both Tier1 and Tier2 cobrand.

Yodlee CustomerCare provides a dashboard view to Yodlee MoneyCenter consumer activity, and serves as an online system for reporting, escalating, managing, prioritizing, and resolving all consumer issues.

- Tier1 – Yodlee customer care team plays the role of Tier1 for yodlee.com customers. Financial institution customer care team also plays the role of Tier1 support for financial institution customers.
- Tier2 – Yodlee customer care team plays the role of Tier2 support for financial institution customers.

There is a separate instance of the Yodlee CustomerCare application for each cobrand.

1.1 Objective

This document provides a description of the Yodlee CustomerCare architecture and procedures for deploying Tier1 and Tier2 cobrand at the financial institution.

1.2 Audience

The intended audience for this document includes financial institutions and the Yodlee Deployment teams who deploy Yodlee CustomerCare for Tier1 and Tier2 customer service.

- Tier1 – Financial institution cobrand
- Tier2 – Yodlee cobrand

2 YODLEE CUSTOMERCARE ARCHITECTURE

Figure 1 is a representation of the Yodlee CustomerCare architecture. The Yodlee CustomerCare application covers to major areas:

- User related information such as payments, transfers, etc., that is stored in the cobrand OLTP database
- Service request details that is stored in the SR DB. The SR DB is a common DB shared between Yodlee and cobrand for whom Yodlee provides Tier2 support.

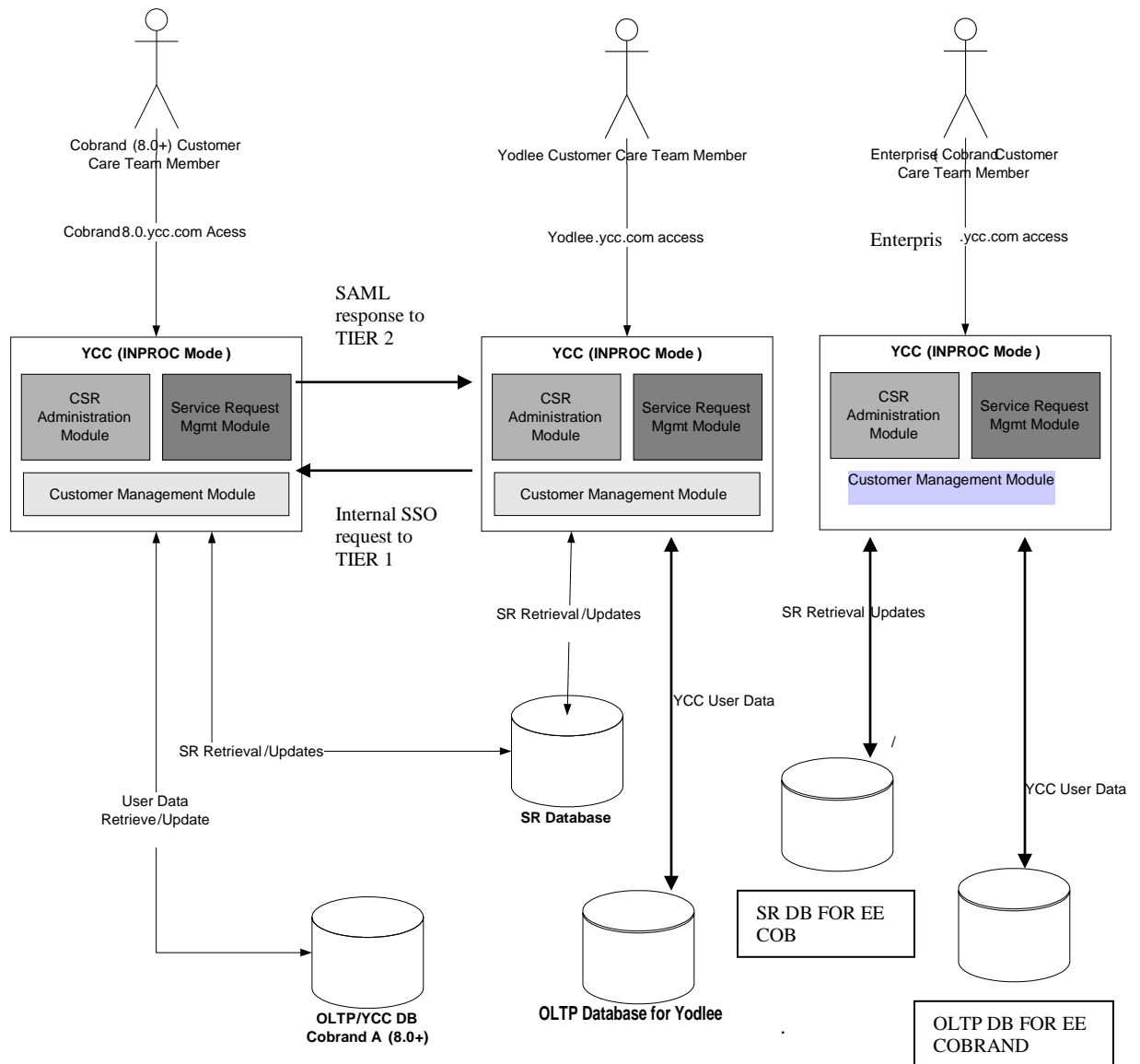


Figure 1 – A representation of Yodlee CustomerCare application

3 DEPLOYING THE TIER2 COBRAND

Following are the basic steps for deploying the Yodlee CustomerCare Tier2 cobrand:

- Set up the database
- Install Yodlee CustomerCare
- Create the cobrand administrator
- Configuration

3.1 Setting up the Databases

Set up the following databases:

- OLTP Schema for Tier1 and Tier2
- Centralized Yodlee CustomerCare Schema (Service Request Schema), which is shared by Tier1, Tier2, and Yodlee MoneyCenter deployments. The centralized Yodlee CustomerCare schema is referred to as SR DB

3.2 Installing Yodlee CustomerCare Guide

The steps for installing Yodlee CustomerCare is available in the following location:

//projects/Platform/TechPub_8.0.2/Drafts/Core/Installation/YCC_Installation_v8.0.2.doc

3.3 Creating the Cobrand Administrator

Yodlee CustomerCare Config tool has the ability to create a cobrand administrator for Customer Care.

The steps for installing and running the tool is available in the following location:

\\projects\Platform\TechPub_8.0.2\Drafts\Core\Installation\YCCCConfigTool_Installation.doc

3.4 Configuration

3.4.1 ACL Configuration

3.4.1.1 Mapping Products for Cobrand

In order to map products for cobrand using ACL configuration:

1. Add data to the COBRAND_PRODUCT table.
2. Insert Yodlee CustomerCare product to the COBRAND_PRODUCT table.

Following query is used to insert the Yodlee CustomerCare product into the COBRAND_PRODUCT table in the OLTP database:

```
INSERT INTO COBRAND_PRODUCT (COBRAND_PRODUCT_ID, COBRAND_ID,
PRODUCT_CATALOG_ID, PRODUCT_VERSION, ROW_CREATED, ROW_LAST_UPDATED)
VALUES (PK, COBRAND_ID, 6, 2, SYSDATE, SYSDATE);
```

Where

PRODUCT_CATALOG_ID is a FK to [PRODUCT_CATALOG](#) table

PRODUCT_VERSION is a FK to [RELEASE_VERSION](#) table

Similarly we need to insert other products based on the products purchased.

3.4.1.2 Setting up the ACL values at COBRAND level

Yodlee CustomerCare Config tool has the ability to set the ACLs at the cobrand level.

The steps to install and run the tool is available in the following location:

\\projects\Platform\TechPub_8.0.2\Drafts\Core\Installation\YCCConfigTool_Installation.doc

3.4.2 Enabling Products for Case Management

In order to enable Yodlee Case Management functionality:

1. Map in FI_REPOSITORY table.
2. Map in FI_PRODUCT_MAP table in the Yodlee CustomerCare schema for each Yodlee application that cobrand has purchased.

3.4.2.1 FI_REPOSITORY

The FI_REPOSITORY contains information of all cobrands. An entry in this table is mandatory for a cobrand.

To configure the FI_REPOSITORY for Tier2:

1. Add an entry in the FI_REPOSITORY with IS_YODLEE_COBRAND as 1.

```
INSERT INTO FI_REPOSITORY (
    FI_REPOSITORY_ID,
    COBRAND_ID,
    APPLICATION_ID,
    FI_NAME,
    PLATFORM_VERSION_ID,
    IS_ENABLED,
    IS_YODLEE_COBRAND,
    ROW_CREATED, ROW_LAST_UPDATED)
VALUES
(PK, COBRANDID, 'APPLICATION_ID', 'COBRAND_NAME', 6, 1, 1,
SYSDATE, SYSDATE);
```

Where

PK – Primary key of the table

COBRANDID – Tier2 cobrand ID

APPLICATION_ID – Tier2 Yodlee CustomerCare Application ID
COBRAND_NAME – Yodlee
PLATFORM_VERSION_ID – FK to [PLATFORM_VERSION](#) table

Note: There should be only one Tier2 cobrand.

3.4.2.2 FI_PRODUCT_MAP

1. Add new records to the FI_PRODUCT_MAP to map Yodlee products (application) for a cobrand.

Note: Product refers to Yodlee applications like Billpay, FundTransfer etc.

Following is a sample insert query to insert data into FI_PRODUCT_MAP:

```
INSERT INTO FI_PRODUCT_MAP VALUES (PK, FI_REPOSITORY_ID, PRODUCT_ID,  
21, 1);
```

Here PRODUCT_ID is a FK to [PRODUCT](#) table

For Tier2, add the following products in the FI_PRODUCT_MAP table:

- YODLEE_MONEYCENTER
- YODLEE_PFM
- YODLEE_BILLPAY
- YODLEE_FUNDS_TRANSFER
- YODLEE_NETWORK_PAY
- YODLEE_BPAA
- YODLEE_MOBILE
- YODLEE_HOUSEHOLDING

3.4.3 SAML Setup

There is no default setup for Tier2. However, SAML setup has to be configured for Tier2 that provides SSO (Single Sign On) support. For details on SAML setup, see section 4.3.3.

3.4.4 Yodlee CustomerCare Cobranding

Following files are cobrandable for any strings and params to be cobrandable:

- CobrandableStrings.properties
- CobrandableParams.properties

4 DEPLOYING TIER1 COBRAND

Following are the basic steps for deploying the Yodlee CustomerCare Tier1 cobrand.

- Install Yodlee CustomerCare
- Create the cobrand administrator
- Configuration

4.1 Installing Yodlee CustomerCare Guide

The steps for installing Yodlee CustomerCare is available in the following location:

//projects/Platform/TechPub_8.0.2/Drafts/Core/Installation/YCC_Installation_v8.0.2.doc

4.2 Creating the Cobrand Administrator

For information on creating the cobrand administrator, see section 3.3.

4.3 Configuration

Following are the application IDs for configuring:

- Normal Yodlee CustomerCare
- SSO

4.3.1 ACL Configuration

For information on ACL Configuration, see section 3.4.1

4.3.2 Enabling Products for Case Management

In order to enable Yodlee Case Management functionality:

1. Map in FI_REPOSITORY table.
2. Map in FI_PRODUCT_MAP tables in the Yodlee CustomerCare schema for each Yodlee application that cobrand has purchased.

4.3.2.1 FI_REPOSITORY

The FI_REPOSITORY contains information regarding all cobrands. An entry in this table is mandatory for a cobrand.

To configure the FI_REPOSITORY for Tier1:

1. Add an entry in the FI_REPOSITORY with IS_YODLEE_COBRAND as 0.

```
INSERT INTO FI_REPOSITORY (  
    FI_REPOSITORY_ID,  
    COBRAND_ID,  
    APPLICATION_ID,  
    FI_NAME,
```



```

        PLATFORM_VERSION_ID,
        IS_ENABLED,
        IS_YODLEE_COBRAND,
        ROW_CREATED, ROW_LAST_UPDATED)
VALUES
(PK, COBRANDID, 'APPLICATION_ID', 'COBRAND_NAME', 6, 1, 0,
SYSDATE, SYSDATE);

```

Where

PK – Primary key of the table

COBRANDID – Tier1 cobrand ID

APPLICATION_ID – Tier1 Yodlee CustomerCare application ID

COBRAND_NAME – Financial institution name

PLATFORM_VERSION_ID – FK to [PLATFORM_VERSION](#) table

4.3.2.2 FI_PRODUCT_MAP

For information on FI_PRODUCT_MAP, see section 3.5.1.2

4.3.3 SAML Setup

Following are the application IDs for SAML setup:

- Normal Yodlee CustomerCare
- SSO

4.3.3.1 Creating Issuer and Source

This section is applicable only if Yodlee CustomerCare provides Tier2 support using SSO mechanism.

Following are the steps to create issuer and source:

1. [Import](#) Tier1 Yodlee CustomerCare server certificate into the cacerts of Tier2 Server JVM.
2. Create a new issuer and source and configure it to use SAML Browser Post Profile SSO mechanism using ssotools installer in the Tier1 OLTP database.
3. Change the following key values while running the ssotools installer.

SAML PARAM KEY ID	KEY_NAME	VALUE
1	com.yodlee.saml.library	OpenSAML
5	com.yodlee.saml.signResponse	False
6	com.yodlee.saml.signAssertion	False
7	com.yodlee.saml.verifyResponseSignature	False
8	com.yodlee.saml.verifyAssertionSignature	False
12	com.yodlee.saml.signRequest	False
13	com.yodlee.saml.verifyRequestSignature	False

4. Enable SSO for the core group used by the Tier1 Yodlee CustomerCare application irrespective whether the cobrand uses SSO or not.

4.3.3.2 Cobranding to Support Tier1 Cobrand without SSO

This section is applicable if Yodlee CustomerCare provides Tier2 support without using SSO mechanism.

The following key is cobranded in Tier 2 for customer care team of Yodlee and financial institution (Tier 1):

- **CobrandableParams.properties**

The value of this key is a comma separated list of all Tier1 cobrand IDs that does not use SSO mechanism for Tier2 support.

```
feature.switch.CFS__DISABLE_TIER2_SSO_TIER1_COBRANDS=TIER1_COBRAND_ID
```

4.3.3.3 Cobranding to Support the Tier1 Cobrand with SSO

4.3.3.3.1 TIER2 CobrandableParams.properties.

The following keys are changed based on the SAML configuration. These values can be obtained after running the ssotools.

```
##Configuring issuer name
```

```
com.yodlee.isso.saml.issuer.TIER1_COBRAND_ID=Vunnam
```

```
##Configuring source name
```

```
com.yodlee.isso.saml.source.TIER1_COBRAND_ID=amexcst
```

```
##Configuring response receiver url
com.yodlee.isso.saml.response.receiver.TIER1_COBRAND_ID
=https://in-wxpzenn23/clientycc/home.default.do

##Configuring Saml Library
com.yodlee.isso.saml.library.TIER1_COBRAND_ID =OpenSAML
com.yodlee.apps.externalsite.rootContext.TIER1_COBRAND_ID=/ycc
com.yodlee.apps.externalsite.serverURL.TIER1_COBRAND_ID
=https://in-lenor46:8443
com.yodlee.apps.externalsite.applicationExt.TIER1_COBRAND_ID
=default.do
```

The following is an example given for Scottrade:

```
com.yodlee.isso.saml.issuer.10002168=www.scottrade.com_ycc
com.yodlee.isso.saml.source.10002168=scottrade_ycc
com.yodlee.isso.saml.library.10002168=OpenSAML
com.yodlee.apps.externalsite.rootContext.10002168=/ycc
com.yodlee.apps.externalsite.serverURL.10002168=https://172.17.25
.66:8643
com.yodlee.apps.externalsite.applicationExt.10002168=scottradeycc
.do
com.yodlee.isso.saml.response.receiver.10002168=https://172.17.25
.66:8643/ycc/home.scottradeycc.do
```

4.3.3.2 TIER1 CobrandableParams.properties

The following keys are cobranded for each cobrand:

```
feature.switch.CFS_SSO=1
feature.switch.CFS_SSO_SAML=1
feature.switch.CFS_SSO_REDIRECT_ON_LOGOUT =1
feature.switch.CFS_SSO_LOGOUT_FIRST_MANDATORY=1
feature.param.SSO_DEFAULT_SOURCE=scottrade_ycc

com.yodlee.sso.partner.maskContext=/ycc
com.yodlee.sso.partner.cookie=
com.yodlee.apps.base.sso.group=0
```

4.3.4 Yodlee CustomerCare Cobranding

Following files are cobranded for any strings and params to be cobranded:

- CobrandableStrings.properties
- CobrandableParams.properties

5 INDEX

5.1 PRODUCT_CATALOG Table

For reference, the following table gives the list of all entries in the PRODUCT_CATALOG table.

<i>PRODUCT_CATALOG_ID</i>	<i>PRODUCT_NAME</i>
1	PFM
2	MOBILE
3	BILLPAY
4	FUNDSTRANSFER
5	NETWORKPAY
6	YCC
7	ADVISOR
8	BPAA
9	ID_VERIFICATION

5.2 RELEASE_VERSION Table

For reference, the following table gives the list of all entries in the RELEASE_VERSION table.

<i>RELEASE_VERSION_ID</i>	<i>NAME</i>	<i>DESCRIPTION</i>	<i>IS_ENABLED</i>
3	8.1	8.1	1
2	802	802	1
1	80	80	1

5.3 PRODUCT Table

For reference, the following table gives the list of all existing products.

<i>PRODUCT_ID</i>	<i>PRODUCT_NAME</i>
16	YODLEE_MONEYCENTER
17	YODLEE_PFM
18	YODLEE_BILLPAY
19	YODLEE_FUNDS_TRANSFER
20	YODLEE_NETWORK_PAY
21	YODLEE_BPAA
22	YODLEE_MOBILE
23	YODLEE_ADVISOR_MANAGEMENT
24	YODLEE_HOUSEHOLDING

5.4 PLATFORM_VERSION Table

For reference, the following table gives the list of all entries in the PLATFORM_VERSION table.

<i>PLATFORM_VERSION_ID</i>	<i>VERSION_NAME</i>	<i>DESCRIPTION</i>
1	3.x	3.x Release
2	4.x	4.x Release
3	5.x	5.x Release
4	6.x	6.x Release
5	7.x	7.x Release
6	8.x	8.x Release

5.5 VERSION Table

For reference, the following table gives the list of all entries in the VERSION table.

<i>VERSION_ID</i>	<i>NAME</i>	<i>DESCRIPTION</i>
1	3.2.0	3.2.0
2	4.1.1	4.1.1
3	4.2.0	4.2.0
4	4.3.0	4.3.0
5	4.4.0	4.4.0
6	4.4.5	4.4.5
7	4.4.6	4.4.6
8	5.3.0	5.3.0
9	5.3.1	5.3.1
10	5.4.0	5.4.0
11	5.5.0	5.5.0
12	5.6.1	5.6.1
13	5.6.2	5.6.2
14	6.0.0	6.0.0
15	6.0.1	6.0.1
16	6.1.0	6.1.0
17	6.3.0	6.3.0
18	7.0.0	7.0.0
20	7.2	7.2
21	8.0.0	8.0.0
22	8.0.2	8.0.2
23	8.1	8.1

5.6 Importing Tier1 Certificate to the Tier2 Cacerts

The following commands are used to create a Tier1 certificate and importing it to Tier2 cacerts:

1. `keytool -keystore ssoKeyStore -genkey -keyalg RSA -keysize 1024 -validity 1000 -alias tier1 -dname "CN=192.168.208.179, OU=APP, L=APP, ST=KA, C=IN"`
2. `keytool -keystore ssoKeyStore -export -rfc -alias tier1 -file tier1.cer`
3. `keytool -import -file tier1.cer -alias tier1 -keystore "%JAVA_HOME%\jre\lib\security\cacerts"`