



Adobe Experience Platform Schema Design

UI LAB

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LAB OVERVIEW

Defining schemas and understanding how data is described by those schemas is one of the first things a customer will do on Adobe Experience Platform. This is the first step to ingesting data to the platform to gain marketing insights.

This lab will introduce you to the Adobe Experience Platform schema design user experience. You will learn how to create your own schemas, as well as browse existing components.

LEARNING OBJECTIVES

What should you walk away with after taking this Lab?

- Understand Experience Data Model concepts
- Build a profile schema
- Add standard field groups to your schema
- Customize standard field groups
- Add custom fields to your schema
- Build a custom field group
- Create enumerated fields

LAB RESOURCES

{Insert final image from mapping sheet of customer account schema mapping}

Source Table	Source Column	XDM Schema	XDM Property	XDM Type	XDM Descriptor	XDM Class	XDM Field Group
Customer Account Streaming	customerID	Customer Account	_dcp.profileIdentities.customerID	string	PI	Individual Profile	Profile Identities (Profile)
Customer Account Streaming	firstName	Customer Account	person.name.firstName			Individual Profile	Demographic Details
Customer Account Streaming	lastName	Customer Account	person.name.lastName			Individual Profile	Demographic Details
Customer Account Streaming	email	Customer Account	personalEmail.address			Individual Profile	Personal Contact Details
Customer Account Streaming	email	Customer Account	_dcp.profileIdentities.personalEmail	string	SI	Individual Profile	Profile Identities (Profile)
Customer Account Streaming	mobilePhone	Customer Account	mobilePhone.number			Individual Profile	Personal Contact Details
Customer Account Streaming	birthDate	Customer Account	person.birthDayAndMonth			Individual Profile	Demographic Details
Customer Account Streaming	birthDate	Customer Account	person.birthYear			Individual Profile	Demographic Details
Customer Account Streaming	billingstreet	Customer Account	billingAddress.street1			Individual Profile	Personal Contact Details
Customer Account Streaming	billingcity	Customer Account	billingAddress.city			Individual Profile	Personal Contact Details
Customer Account Streaming	billingstate	Customer Account	billingAddress.state			Individual Profile	Personal Contact Details
Customer Account Streaming	billingpostalCode	Customer Account	billingAddress.postalCode			Individual Profile	Personal Contact Details
Customer Account Streaming	shippingstreet	Customer Account	shippingAddress.street1			Individual Profile	Personal Contact Details
Customer Account Streaming	shippingcity	Customer Account	shippingAddress.city			Individual Profile	Personal Contact Details
Customer Account Streaming	shippingstate	Customer Account	shippingAddress.state			Individual Profile	Personal Contact Details
Customer Account Streaming	shippingpostalCode	Customer Account	shippingAddress.postalCode			Individual Profile	Personal Contact Details
Customer Account Streaming	emailOptIn	Customer Account	consents.marketing.email.val			Individual Profile	Consent And Preference Details
Customer Account Streaming	smsOptIn	Customer Account	consents.marketing.sms.val			Individual Profile	Consent And Preference Details
Customer Account Streaming	accountCreateDate	Customer Account	_dcp.account.createDate	datetime		Individual Profile	Customer Account Details
Customer Account Streaming	accountEndDate	Customer Account	_dcp.account.endDate	datetime		Individual Profile	Customer Account Details
Customer Account Streaming	createDate	Customer Account	repo.createDate			Individual Profile	
Customer Account Streaming	modifyDate	Customer Account	repo.modifyDate			Individual Profile	
Customer Account Streaming	source	Customer Account	_dcp.account.acqSource	string (enum)		Individual Profile	Customer Account Details

LAB TASKS

- Log into Adobe Experience Platform
- Build a profile-based customer account schema in the UI
 - Add standard field groups
 - Customize standard field groups
 - Create custom field groups
 - Create an enumerated field

DETERMINE XDM MAPPINGS FOR CUSTOMER ACCOUNT SCHEMA

Add steps- for V2

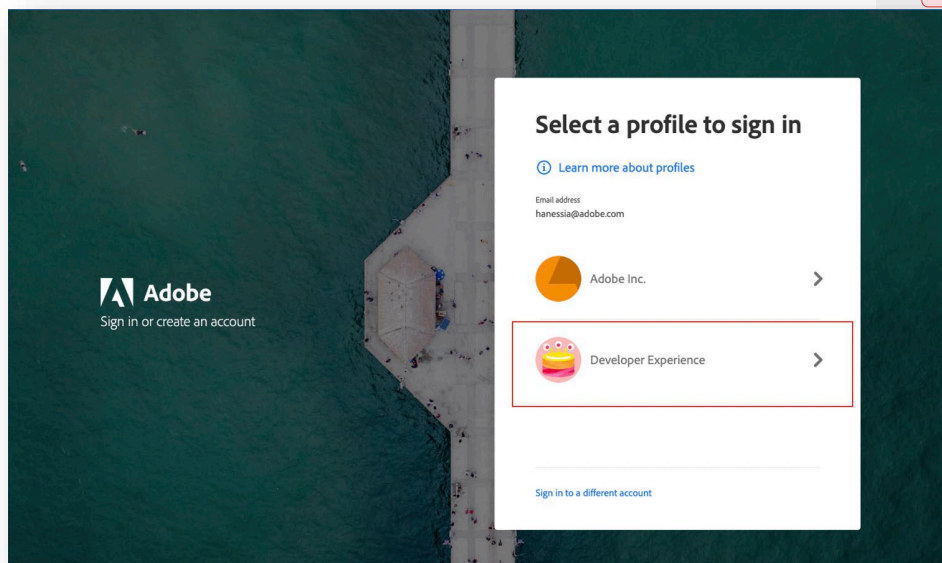
LOG INTO ADOBE EXPERIENCE PLATFORM

1. Navigate to <https://experience.adobe.com/> in your browser
2. Log in using your Adobe Experience Platform credentials. Select the Developer Experience profile.

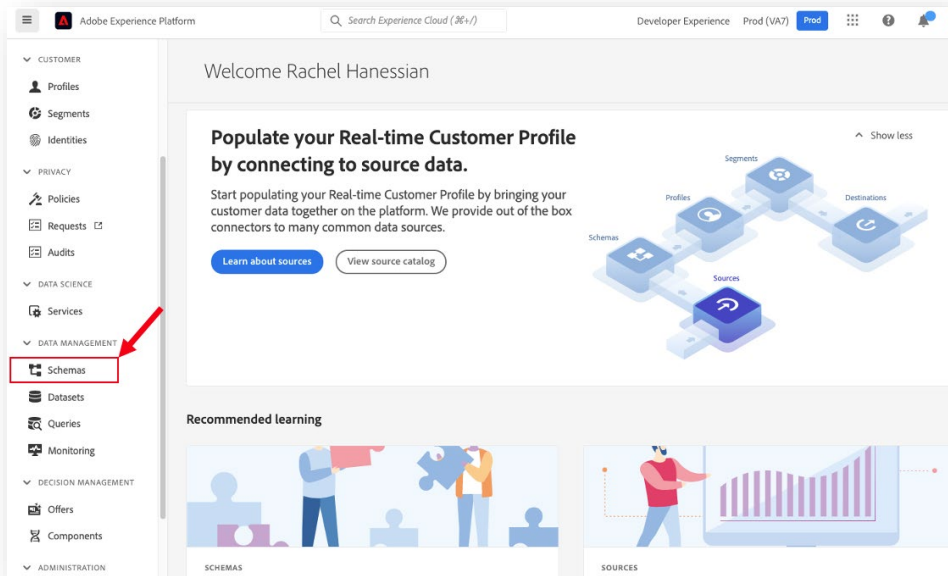
Commented [RH1]: V2:

- Use the field dictionary
- Go on browse tab
- Use search
- Provide hints
- Idea is that they would fill out the table above instead of us giving them what they are creating.

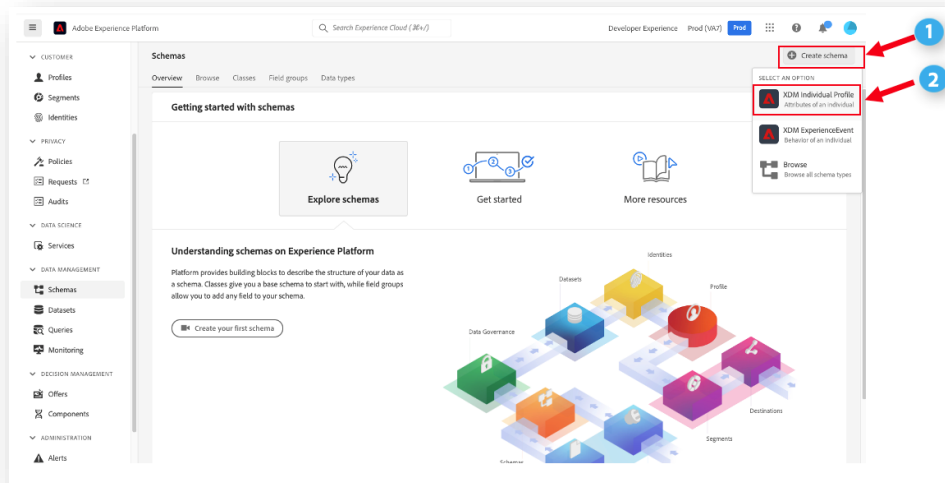
Commented [RH2R1]: Add to lab tasks if you end up adding this in.



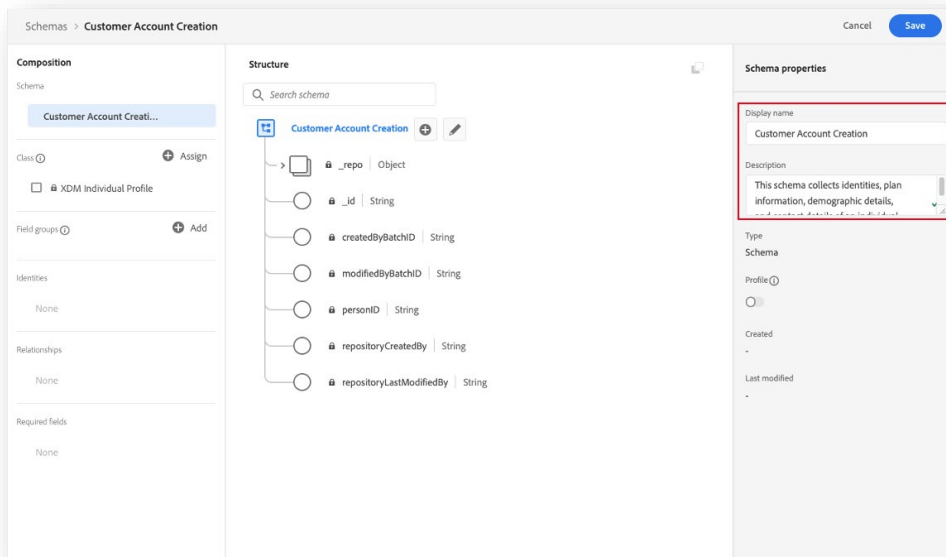
3. Now that you are logged in, click on the "Schemas" tab on the left rail



BUILD A PROFILE-BASED CUSTOMER SCHEMA IN THE UI

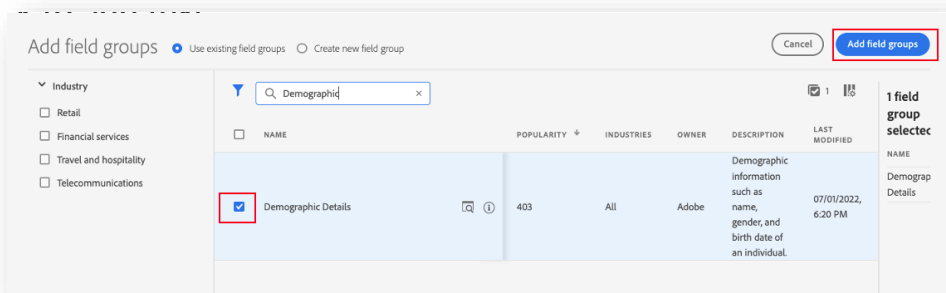
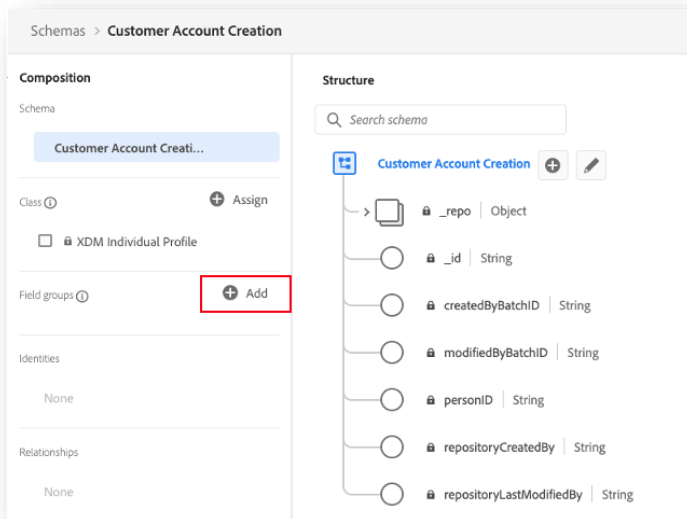


4. You are building a new profile schema. Start by clicking **Create schema > XDM Individual Profile**
5. Profile class schemas allow you to collect attributes about an individual that will be stitched to the profile. The profile class itself contains fields that are not editable such as *modifiedByBatchID*, *PersonID*, etc.
6. **Give your schema a name and description** on the right rail
 - Display Name: *Customer Account Creation*
 - Description: *This schema collects identities, plan information, demographic details, and contact details of an individual.*
 - **Save** your schema using the save button on the top right



ADD STANDARD FIELD GROUPS

7. There are many field groups that exist as standard XDM in Adobe Experience for you to add to your schema and customize. **Add** the *Demographic Details* field group to your schema.
 - Click the **+ Add** on the left rail in the field group section.
 - Search for *Demographic Details*, or find it by browsing the list. Check the checkbox besides it and **click Add field groups**.



Tip

On the Add Field groups modal, try clicking the magnifying glass to the right of each field group to view the structure of the field group before you add it to your schema

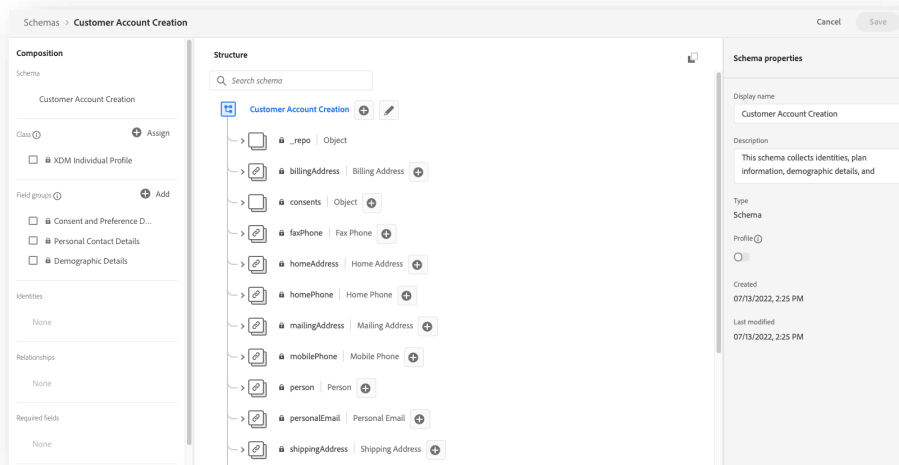
- Notice that now that the *demographic details* field group has been added to your schema, it shows up under field groups on the left rail. There is also now a person object in your schema, brought in by the *demographic details* field group. Expand it by clicking the box to the left of the lock to inspect what is inside the object.
- You need to add additional standard field groups. **Repeat step 7 to add two additional field groups:**

- *Personal Contact Details*
- *Consent and Preference Details*

Tip

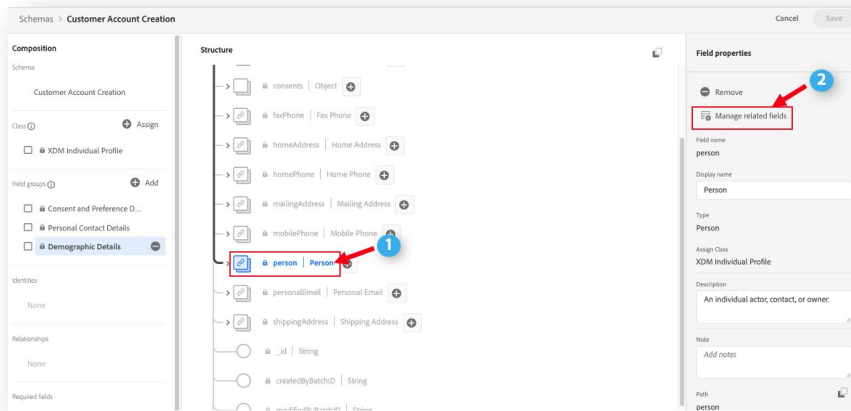
you can add multiple field groups to your schema at once by selecting multiple check boxes in the field group modal

10. **Save** your schema & **validate**. When complete with step 9, your schema should look like this:



CUSTOMIZE STANDARD FIELD GROUPS BY REMOVING FIELDS NOT NEEDED

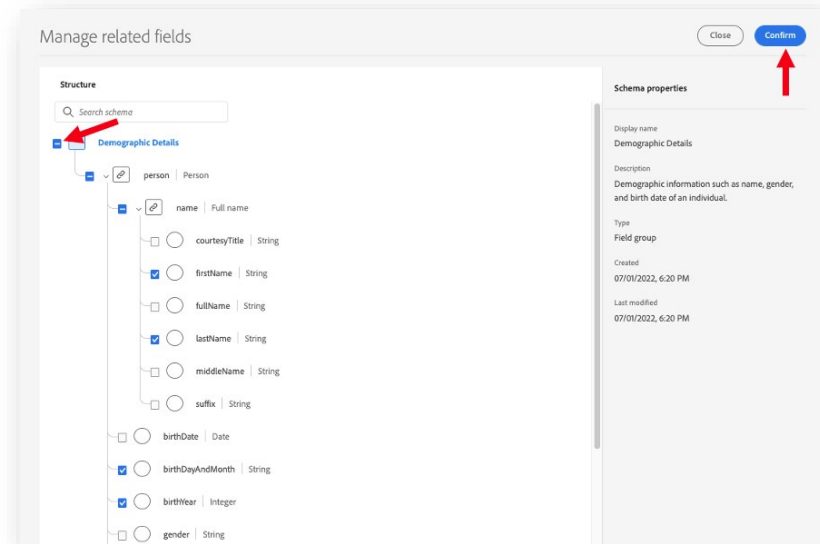
11. Demographic details field group brought in many fields, but you only need *person.name.firstName*, *person.name.lastName*, *person.birthDayAndMonth*, and *person.birthYear*. **Remove fields not needed with Manage Related Fields**. Manage related fields allows you to remove standard fields from your schema, so you are only left with those you need.
- **Select** the *person* object on your schema>**click Manage related fields** on the right rail



- **Expand** the person object by clicking the chevron to the left of *person*.
- **Expand** the *full name* object by clicking the chevron to the left of the name object.
- **Deselect** all attributes besides the four you need (*person.name.firstName*, *person.name.lastName*, *person.birthDayAndMonth*, and *person.birthYear*)

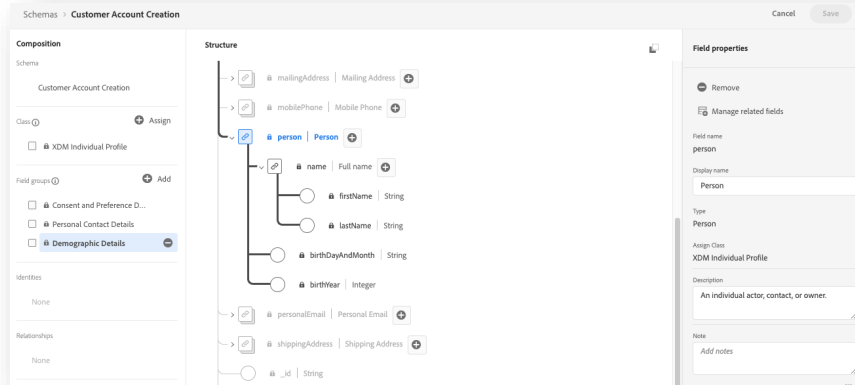
Tip Try clicking the top most checkbox to auto-deselect all child objects, and the reselect those you need!

- **Select confirm** on the top right once you are finished



12. **Save & validate.** When complete with step 10, your schema should look like this. **Expand** the person object to inspect.

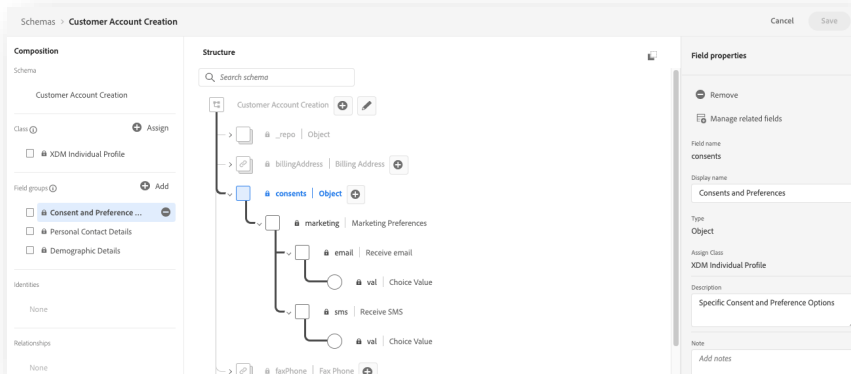
Tip Try clicking the field group name on the left to highlight those fields in your schema



13. Notice that inside the *consents* object brought in by the *Consent and Preference Details* field group, you have some extraneous fields that are not needed for your use case. **Use the manage related fields process** in the

previous step to remove fields not needed from the consent object. Only *consents.marketing.email.val* and *consents.marketing.sms.val* should remain in your schema when you are finished.

14. **Save & Validate.** When you are done with step 13, your consents object should look like this:

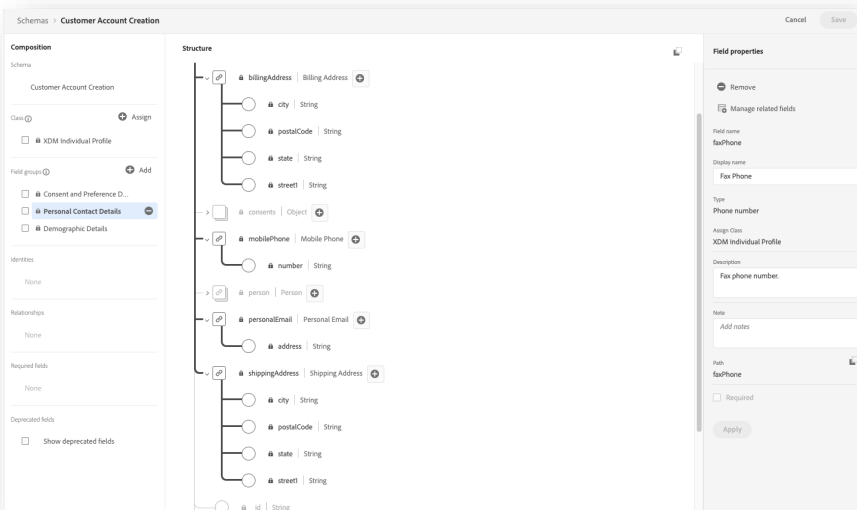


15. Notice that *Personal Contact Details* field group brought in more fields than needed. Use **manage related fields** to remove fields not needed from that field group.

Tip

Remember you first need to click on one of the field group's objects within the schema to trigger **manage related fields** showing up on the right pane.

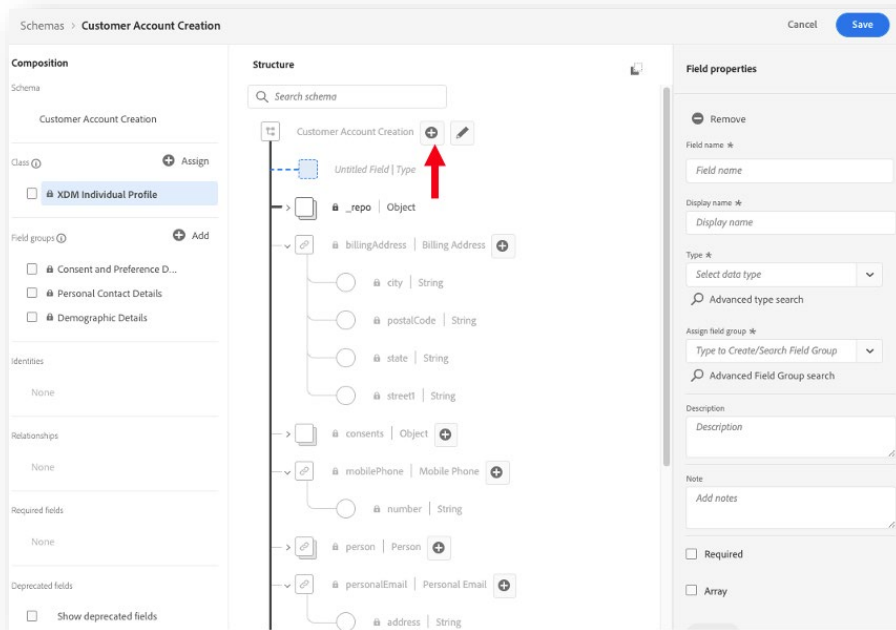
16. **Save & Validate.** When you are done with step 15, your *personal contact detail* field group should look like this (highlighted):



You are now finished with adding standard components to your schema. Great job! Let's move on to building some custom attributes for your schema.

ADD CUSTOM ATTRIBUTES TO YOUR SCHEMA

- There are no standard out of the box components that model the customer account data fields you need to collect (*_dxp.account.createDate*, *_dxp.account.endDate*, *_dxp.account.acqSource*, *_dxp.plan.planID*, *_dxp.plan.name*). For these fields, we will have to build custom fields. To add a new field, **click the plus button at the top of your schema**.



18. Notice the right rail opens with some fields for you to enter. **Create an account object** by filling out

- Field name: *Account*
- Display Name: *Account*
- Type: *Object*
- Assign Field Group: *Customer Account Details*
- **Select Apply** at the bottom to post your changes

Field properties

Remove

Field name *

Account ✓

Display name *

Account ✓

Type *

Object ▼

Advanced type search

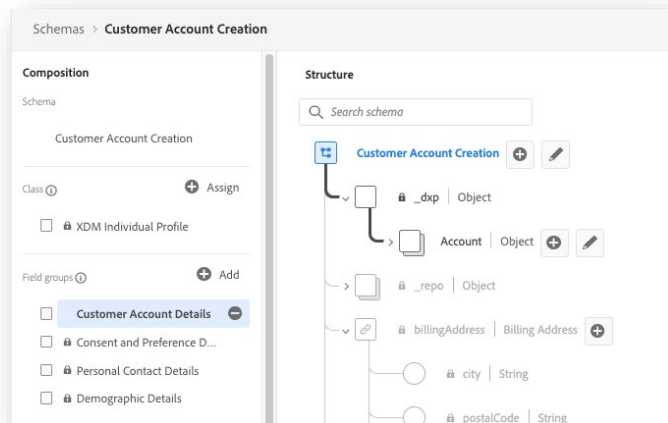
Assign field group *

Customer Account Details ▼

Customer Account Details (New) ✓

Note Your custom account object is under a _dxp tenant namespace. The namespace is used to differentiate your custom fields from the standard fields.

Note Note your new custom field group that appears on the left rail under the field group section called *Customer Account Details*. It appears without a lock icon to show it is custom.



19. Add Child Fields for *createDate*, *endDate*, and *acqSource* under your account object by clicking the plus sign beside the account object

- **Fill meta data on right rail for Create Date attribute**
 - Field Name: *createDate*
 - Display Name: *Create Date*
 - Type: *I*
 - Notice field group has already been assigned to your custom field group because you are working within that object
 - **Select Apply** at the bottom to post your changes
- (click plus sign besides account) & **Fill meta data on right rail for End Date**
 - Field Name: *endDate*
 - Display Name: *End Date*
 - Type: *DateTime*
 - Notice field group has already been assigned to your custom field group because you are working within that object
 - **Select Apply** at the bottom to post your changes
- (click plus sign besides account) & **Fill meta data on right rail for acqSource**
 - Field Name: *acqSource*
 - Display Name: *Acquired Source*
 - Type: *String*
 - Notice field group has already been assigned to your custom field group because you are working within that object
 - **Select Enum** checkbox to add validation for this field at ingestion, as well as suggestion list for segmentation. Add enum values *web;Web, Instore; In Store*

Commented [RH3]: QUESTION:
In the spreadsheet this says I, but shouldn't it be date-time?

Commented [RH4]: QUESTION:
What is the correct display name here?

VALUE*	LABEL
web	Web
inStore	In Store

- **Select Apply** at the bottom to post your changes

20. Your schema also needs a Plan object with a Plan ID and Name. These should be included under the *Customer Account Details* field group. **Click the plus sign at the top of your schema** to add another field. Add a plan object

- Field name: *plan*
- Display name: *Plan*
- Type: *Object*
- Assign field group: Since you are adding this field to the root of your schema, it could belong to any field group. You therefore must search for the field group you'd like to add it to. Start typing *Customer Account Details* and select that field group.

Field properties

Remove

Field name *

plan ✓

Display name *

Plan ✓

Type *

Object ▼

Advanced type search

Assign field group *

Customer Account Details ▼

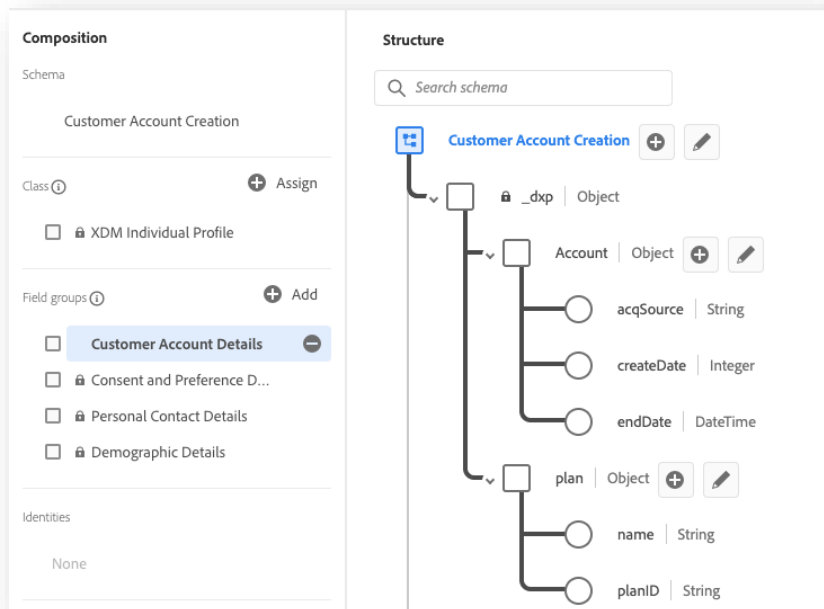
Customer Account Details ✓

- Select **Apply** at the bottom to post your changes

21. **Add Child Fields** for *planID* and *planName* under your Plan object by **clicking the plus sign** beside the Plan object

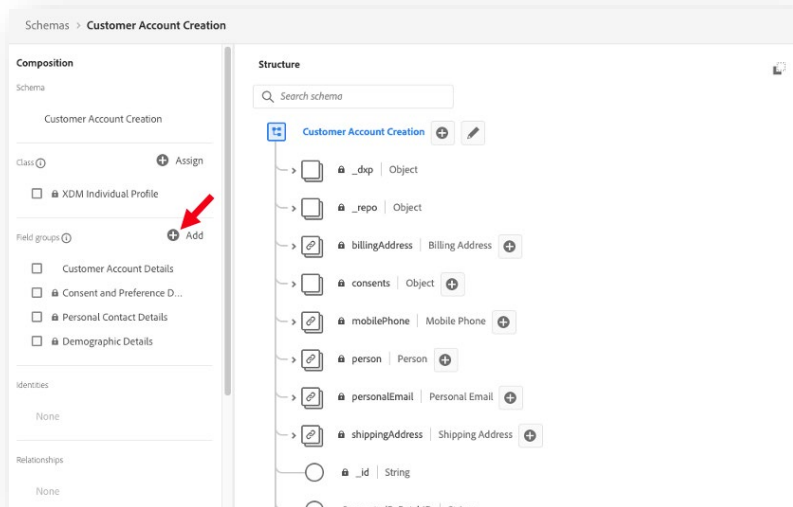
- **Fill meta data on right rail for planID**
 - Field Name: *planID*
 - Display Name: *Plan ID*
 - Type: *string*
 - Notice field group has already been assigned to your custom field group because you are working within that object
 - **Select Apply** at the bottom to post your changes
- (click plus sign besides account) & **Fill meta data on right rail for Name**
 - Field Name: *name*
 - Display Name: *Name*
 - Type: *String*
 - Notice field group has already been assigned to your custom field group because you are working within that object
 - **Select Enum** checkbox to add validation for this field at ingestion, as well as suggestion list for segmentation. Add enum values *basic;Basic,ultimate;Ultimate,pro;Pro*
 - **Select Apply** at the bottom to post your changes

22. **Save & Validate.** When you are done with step 20, your Customer Account Details field group should look like this:



23. You need to create a custom field group that contains your primary and secondary identities. Earlier you created a new field group by first adding a field and assigning it to a new custom field group on the fly. There is a second way to create a new field group that you will try now.

- Click the **+** next to **add** on the left pane in the field group box



24. Select the **create new field group** radio button at the top and give your field group a name and description:

- Display Name: *Profile Identities [Profile]*
- Description: *Schema that holds profile identities such as customerID and personalEmail*

Add field groups ☐ Use existing field groups ☒ Create new field group 1 Cancel Add field groups 3

Create new field group

A field group allows you to extend reusable fields that contain variables defining one or more attribute intended to be included in a schema or added to a class.

2

Display name *

Profile Identities [Profile] ✓

Description

Schema that holds profile identities such as customerID and personalEmail

25. You still need to add fields *profileIdentities2.CustomerID* & *profileIdentities2.personalEmail* to your new *Profile Identities* field group. Click the **plus sign at the top of your schema** to add a field.

- **Fill meta data on right rail for *profileIdentities2***

- Field Name: *profileIdentities2*
- Display Name: Profile Identities
- Type: *Profile Identities DT 2* — this is the custom datatype you created in the API lab
- Assign field group: *Profile Identities2 (profile)*
- **Select Apply**

Commented [RH5]: Note that if this ui lab comes before the API lab, the user will have to create the data type during this lab.

Your schema is now complete! You will come back to this schema to mark primary & secondary identities, as well as build a relationship between this schema and the Plan table.