Adobe Experience Platform Bootcamp Deep Dive Edition

DOCUMENTATION AND LABS

Customer Account Schema Design - UI LAB

Adobe Experience Platform Bootcamp Deep Dive Edition

CONTENTS

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
- Understand tools for exploring field groups in XDM
- Add standard field groups to your schema
- Customize standard field groups
- Add custom fiel custom field group
- Create enumerated fields

LAB RESOURCES

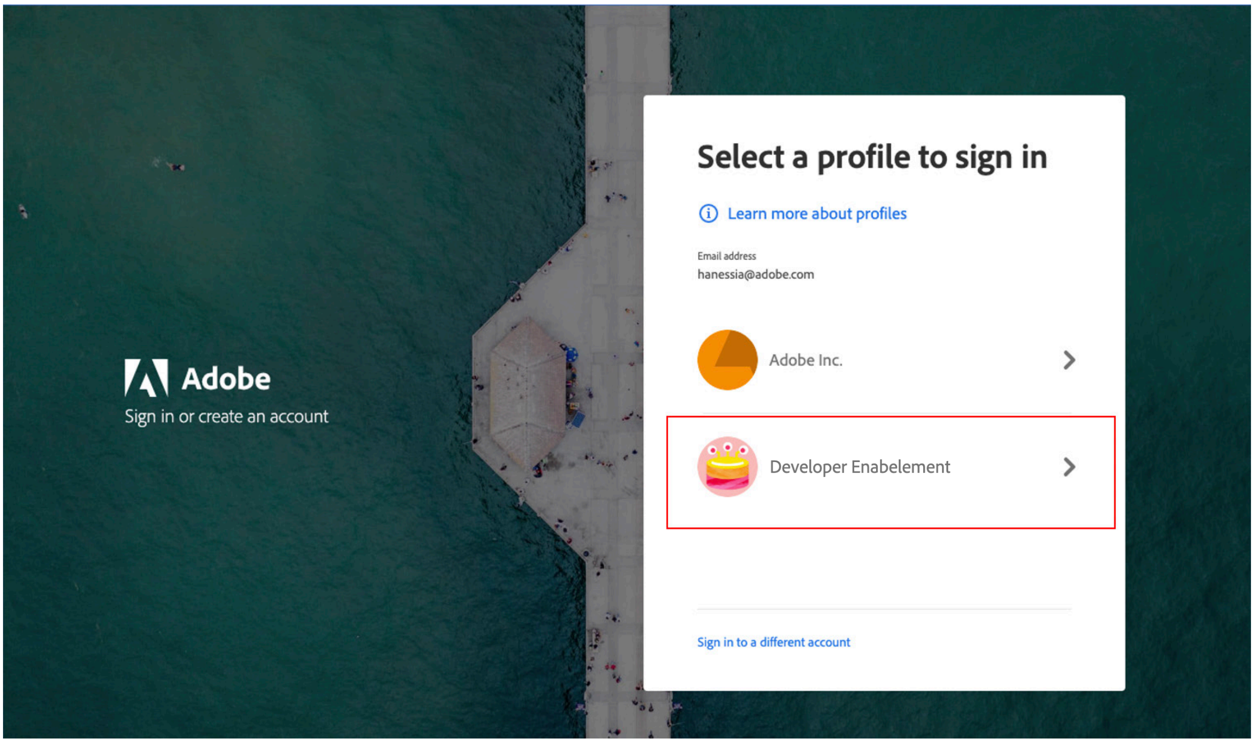
- Customer Account ERD
- Customer Account Mapping Sheet

LAB TASKS

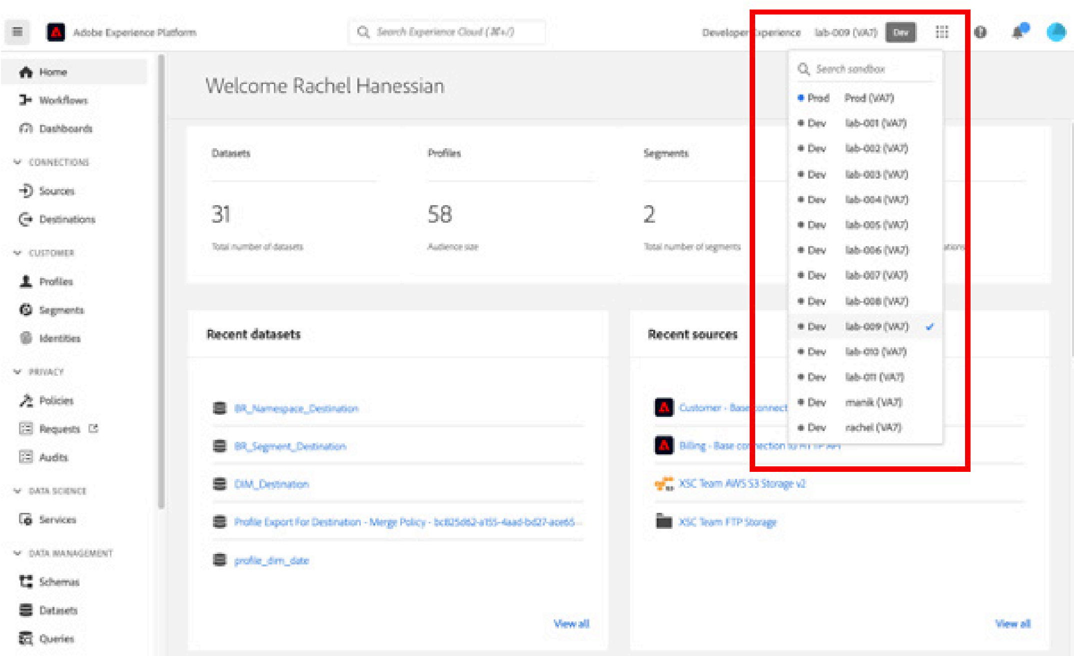
- Log into Adobe Experience Platform
- Build a profile-based customer account schema in the UI
    - Map from source to target XDM
    - Add standard field groups
    - Customize standard field groups
    - Create custom field groups
    - Create an enumerated field

1. LOG INTO ADOBE EXPERIENCE PLATFORM & NAVIGATE TO SCHEMAS

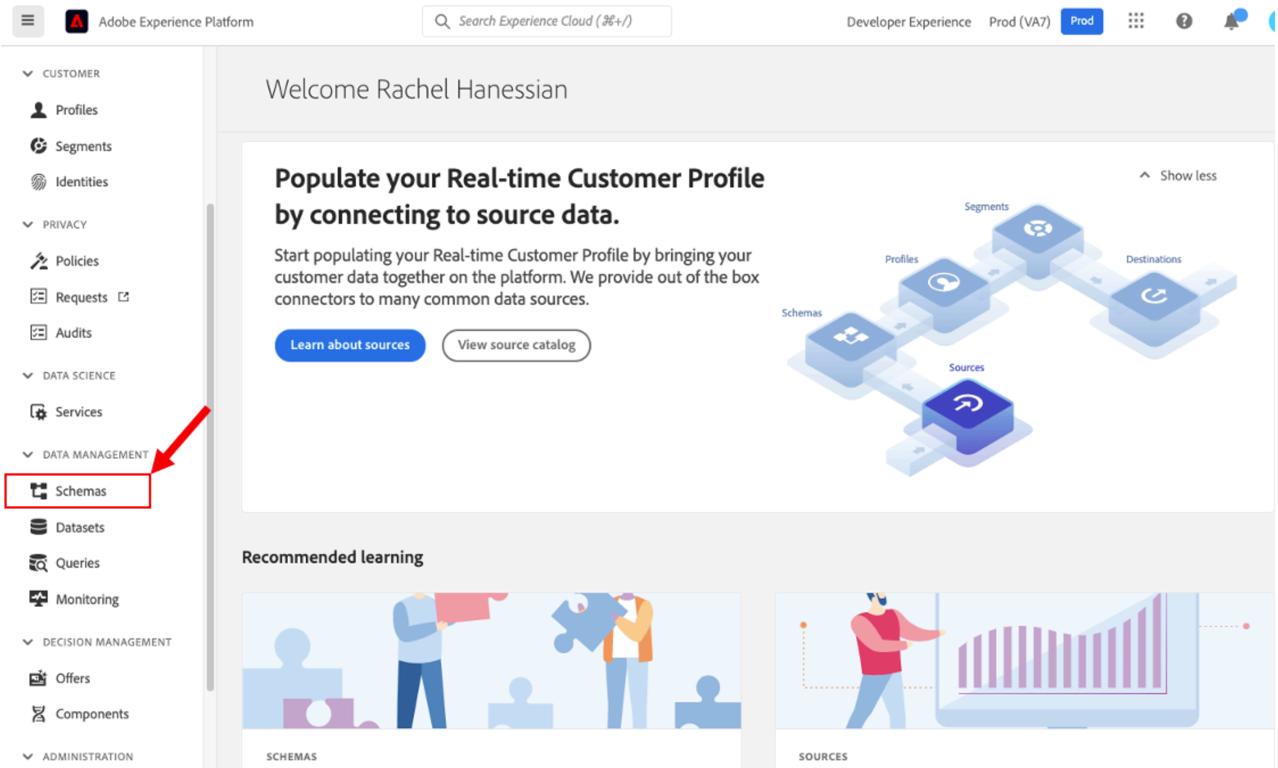
1. Navigate to https://experience.adobe.com/ in your browser
2. **Log in** using your Adobe Experience Platform credentials.
   - **Select** the *Developer Enablement* profile.



   - **Select** the *sandbox #* on the top right which corresponds to your lab number.



3. Now that you are logged in and in the correct sandbox, click on the “Schemas” tab on the left rail



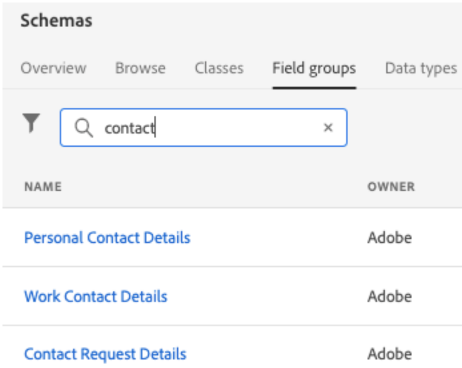
Note	There are some schemas that are pre-created in your sandbox. These include some schemas for your use cases that were pre-created, as well as Adobe Journey Optimizer auto created schemas. For this exercise you will be creating a new schema.

2. DETERMINE XDM MAPPINGS FOR CUSTOMER ACCOUNT SCHEMA

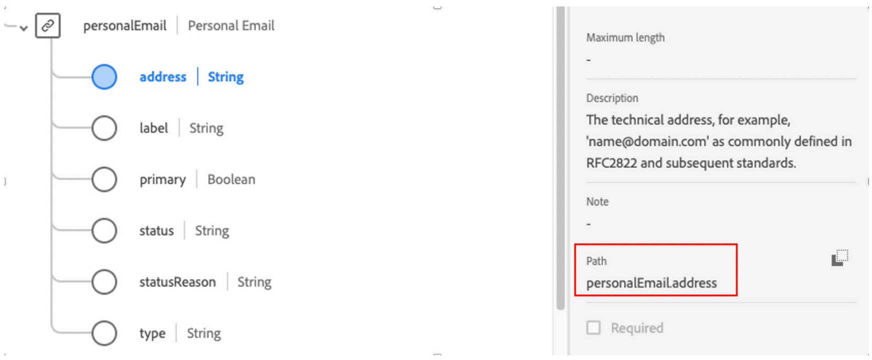
Yesterday during the SID lecture & Lab you built out an AEP ERD. The next step is to map those source attributes to attributes in XDM. During lecture you learned how to determine whether to use a standard field group or a custom field group based on your source data model, and what is available out of the box in XDM. For this activity, your task is to **determine whether to use a custom or standard field group for the following attributes, and write in the proposed XDM mappings.** See steps below for guidance.

Source Table	Source Column	XDM Property	XDM Field Group
Customer Account	email		
Customer Account	mobile_phone		
Customer Account	billing_street_address		
Customer Account	billing_city		
Customer Account	billing_state		
Customer Account	billing_zip_code		
Customer Account	shipping_street_address		
Customer Account	shipping_city		
Customer Account	shipping_state		
Customer Account	shipping_zip_code		

1. Browse what is available out of the box by searching field groups by name. Since you are looking for attributes like email, address, etc, type "contact" into the search box.

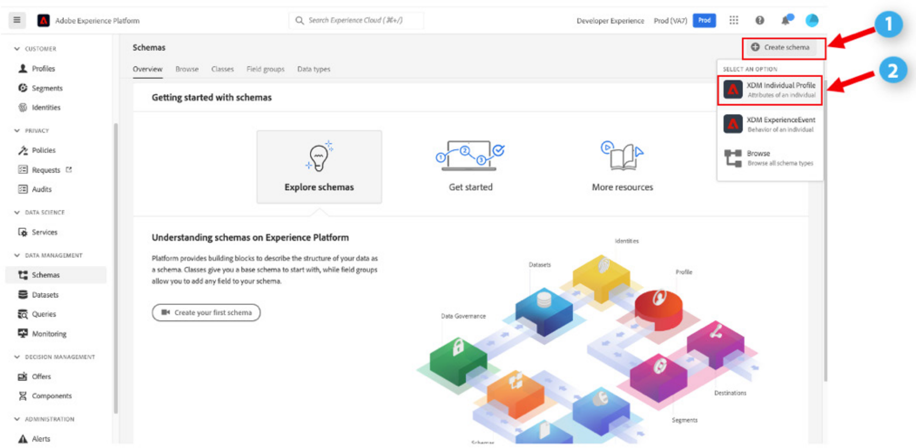


2. Browse the results by clicking the blue hyperlink.
3. Note that each field has an associated dot notation path on the right rail that you can use for your mapping sheet.



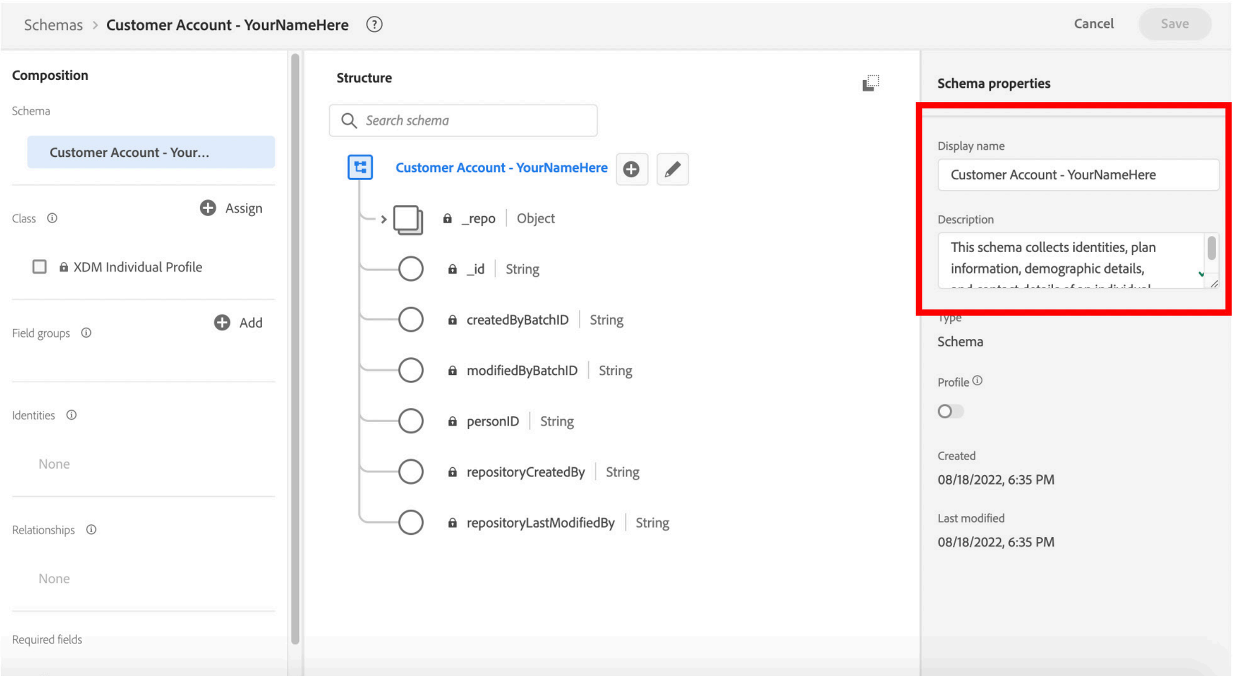
Note	You can use partial field groups, so just write in the attribute paths you need from the field group you identified.

3. BUILD A PROFILE-BASED CUSTOMER SCHEMA IN THE UI



1. Now that your mapping sheet is complete, you're ready to build a new profile schema. Start by clicking **Create schema > XDM Individual Profile**

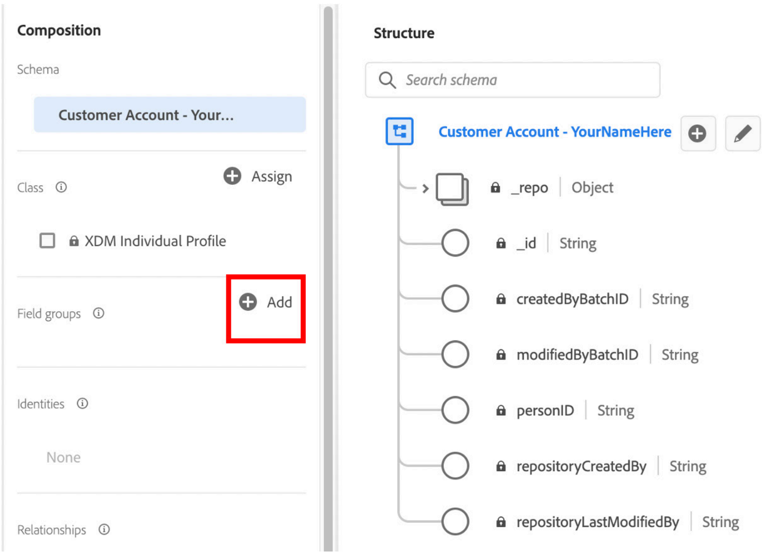
2. Profile class schemas allow you to collect attributes about an individual that will be stitched to the profile. The profile class itself contains fields that are not editable such as *modifiedByBatchID*, *PersonID,* etc.
3. **Give your schema a name and description** on the right rail
   - Display Name: *Customer Account – [your name]*
   - Description: This schema collects identities, plan information, demographic details, and contact details of an individual.



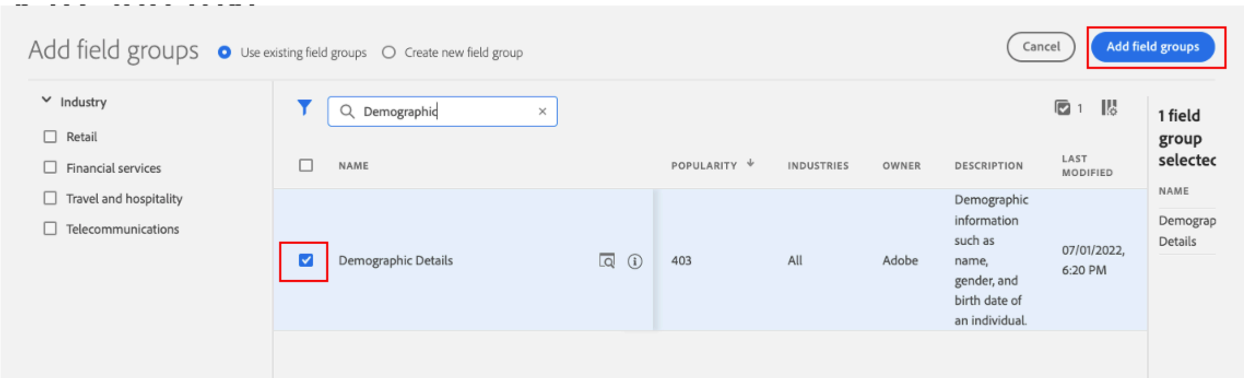
   - **Save** your schema using the save button on the top right.

4. ADD STANDARD FIELD GROUPS

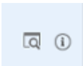
1. There are many field groups that exist as standard XDM in Adobe Experience Platform for you to add to your schema and customize. **Add** the *Demographic Details* field group to your schema.
   - Click the **+ Add** on the left rail in the field group section.



   - Search for *Demographic Details*, or find it by browsing the list. Check the checkbox besides it and **click Add field groups**.



   - Save your schema using the save button on the top right.

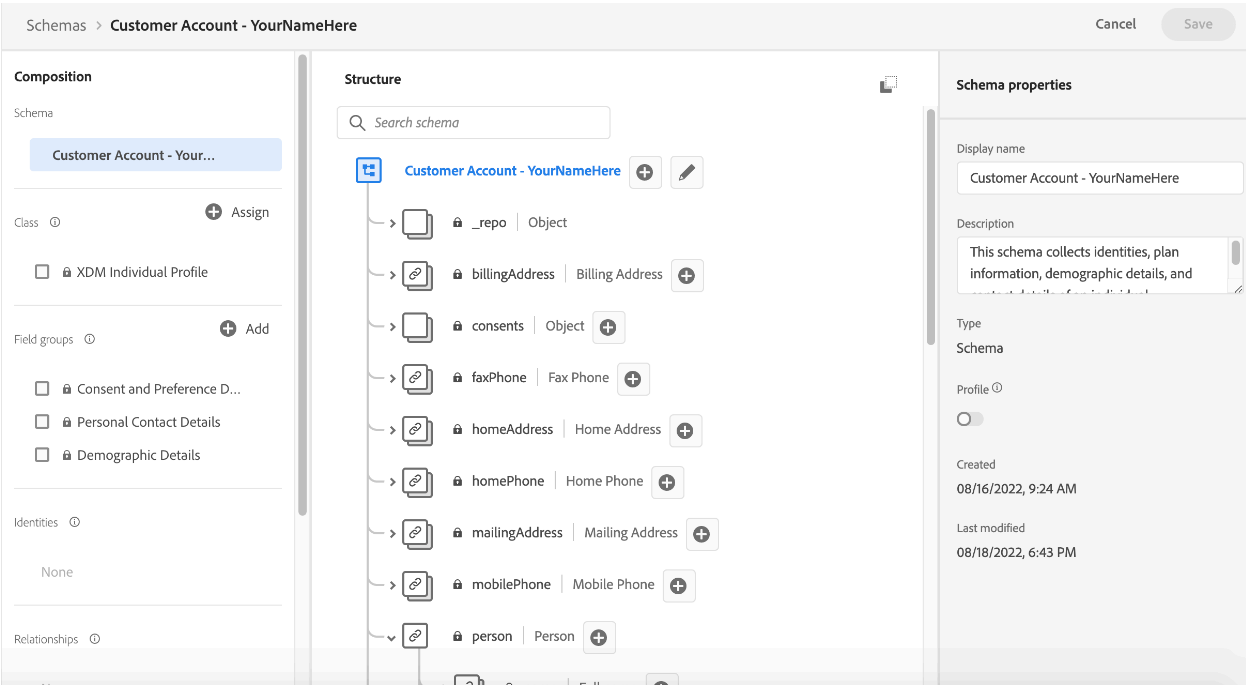
Tip	 On the Add Field groups modal, try clicking the magnifying class to the right of each field group to view the structure of the field group before you add it to your schema.

2. Notice that 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. Note it has a few fields not needed, but we will remove those attributes in a later step.

3. You need to add additional standard field groups. **Repeat the previous steps to add two additional field groups**:
   - *Personal Contact Details*
   - *Consent and Preference Details*

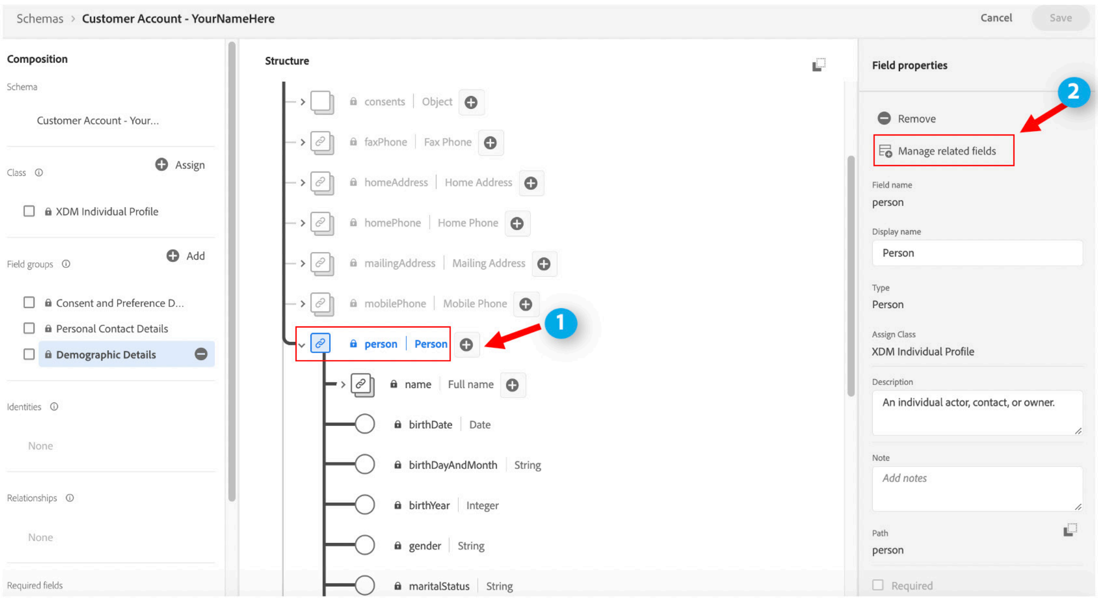
Tip	you can add multiple field groups to your schema at once by selecting multiple check boxes in the field group modal

4. **Save** your schema & **validate** that your schema looks like the below with three field groups on the left, and demographic and contact related objects in the tree structure:



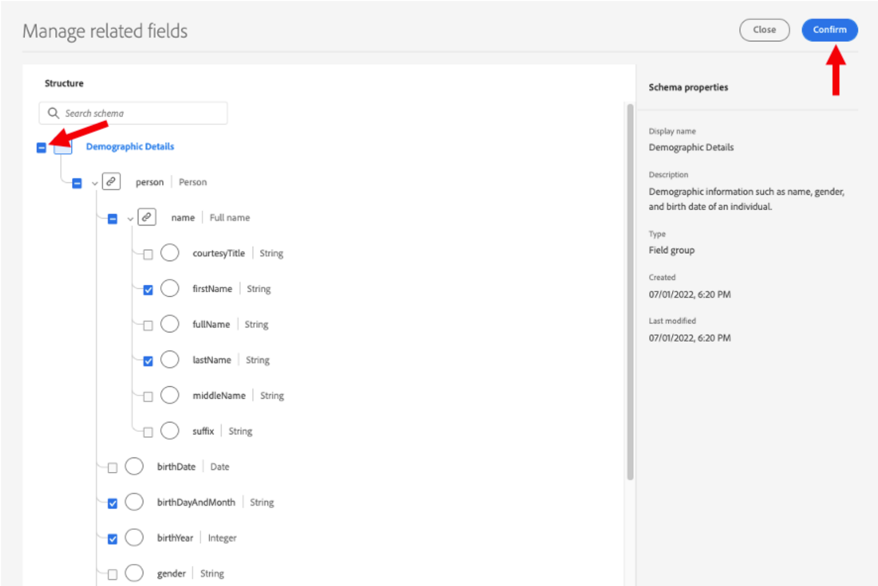
5. CUSTOMIZE STANDARD FIELD GROUPS BY REMOVING FIELDS NOT NEEDED

1. Demographic details field group brought in many fields, but based on your maping sheet, 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.
   - **(1) Select** the *person* object on your schema> (2) **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)*

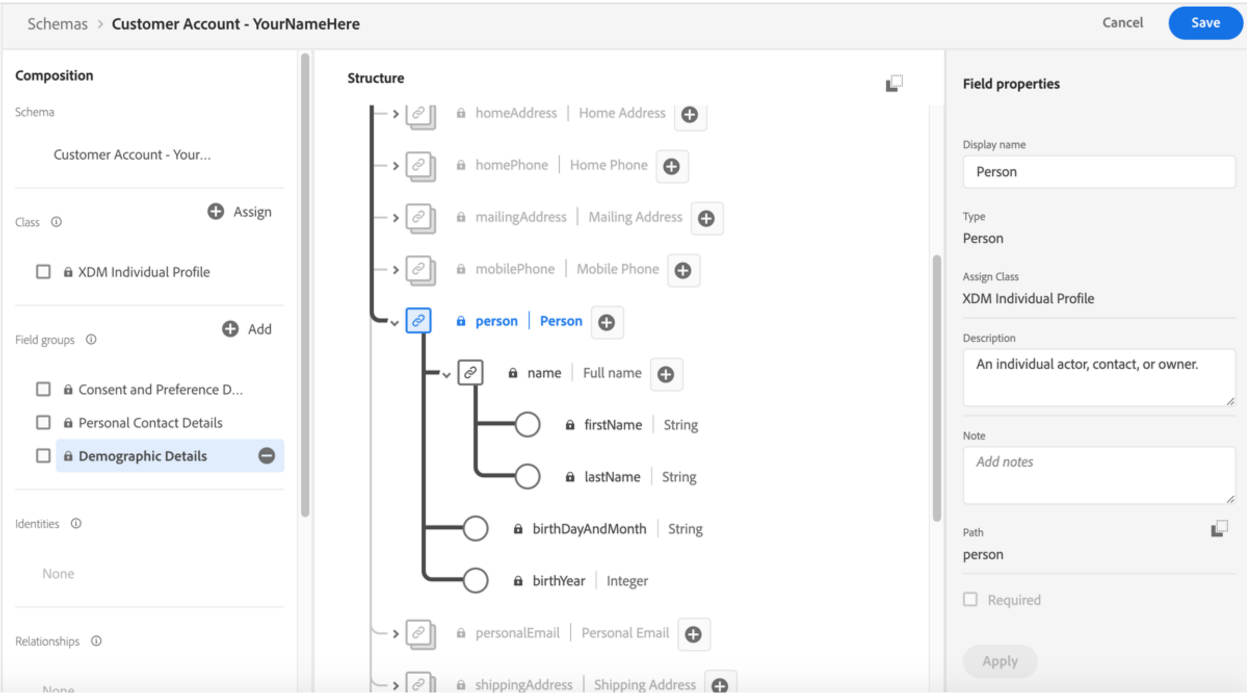
Tip	Try clicking the top-most checkbox to auto-deselect all child objects, and the reselect those you need!



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

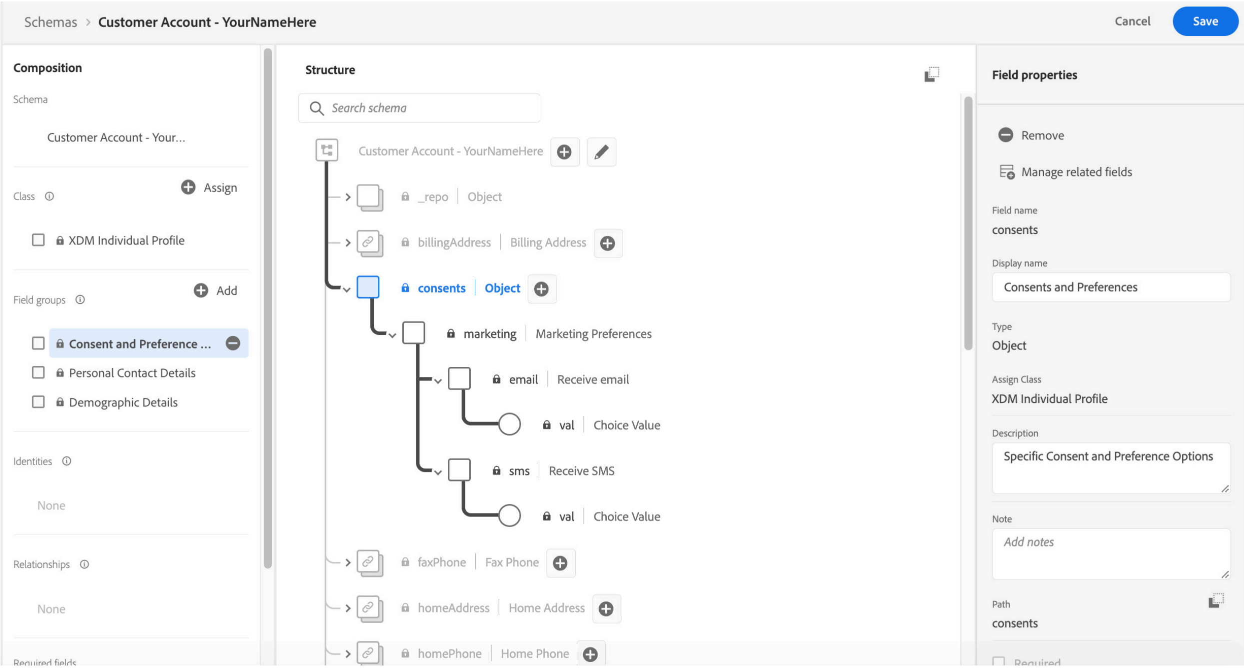
2. **Save & validate** by ensuring your schema matches the below. **Expand** the person object to inspect.

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



3. 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. You know this because some of the fields brought in from the field group are not referenced on your mapping sheet. **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.

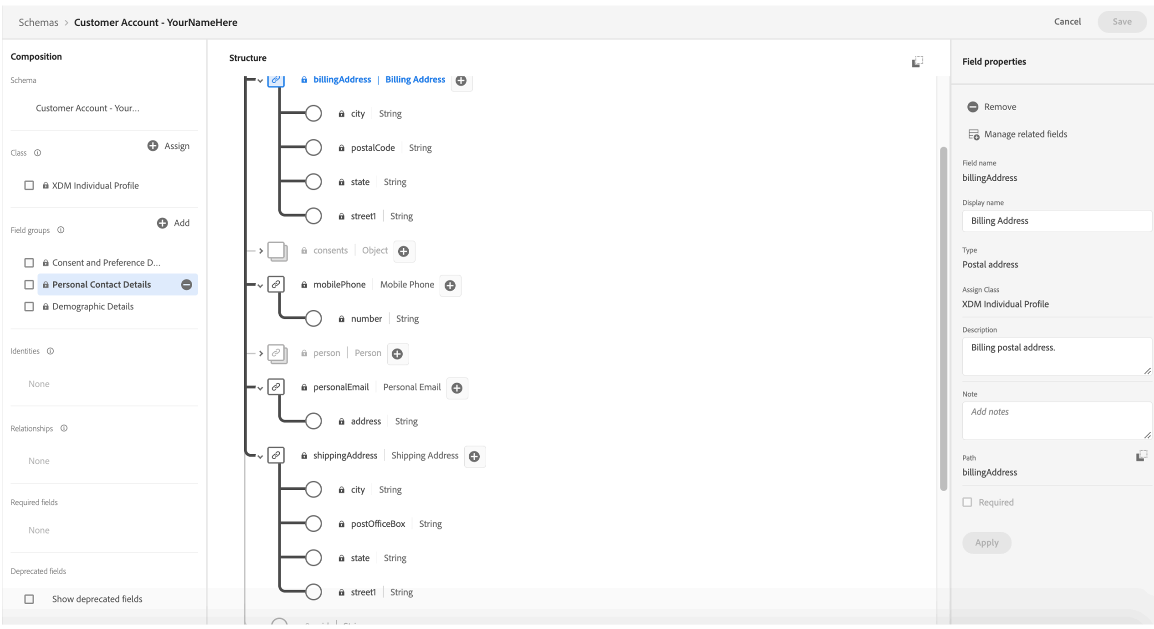
4. **Save & Validate** by ensuring your schema matches the below. When you are done with the previous step, your consents object should look the below screenshot:



5. Notice that *Personal Contact Details* field group brought in more fields than needed. Inspect your mapping sheet completed in the Mapping from Source to XDM section of this lab to validate which fields should be included. **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.

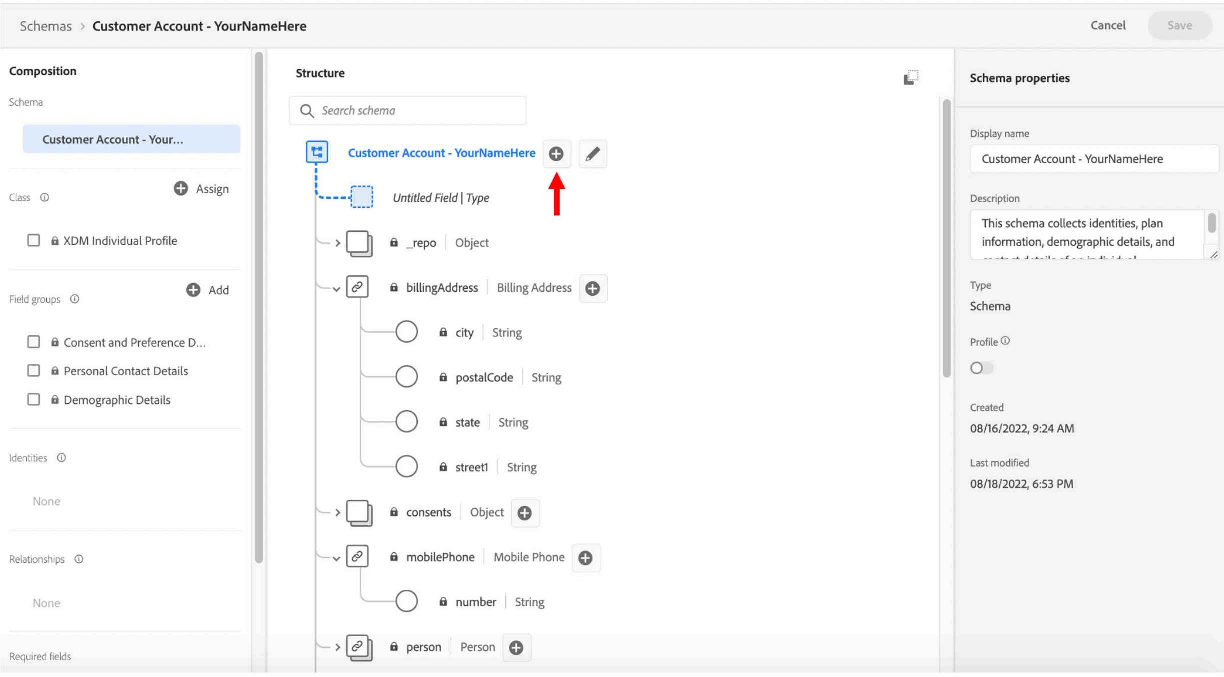
6. **Save & Validate.** When you are done with step 15, your *personal contact detail* field group should look like this (highlighted):



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.

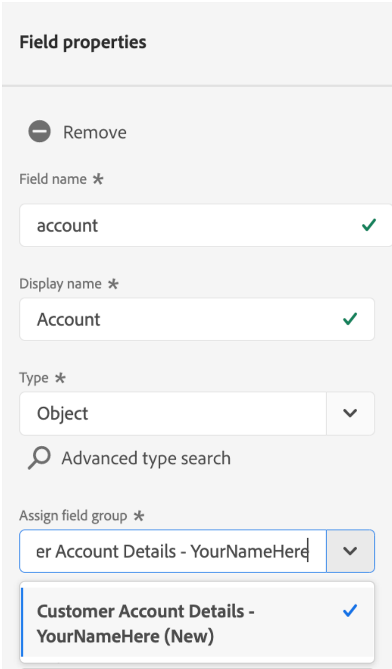
6. ADD CUSTOM ATTRIBUTES TO YOUR SCHEMA

1. As discussed in the lecture, there are no standard out of the box components that model the customer account data fields you need to collect. Look back to your customer account schema ERD. Notice you need to collect attributes called: *_dxp.account.createDate, _dxp.account.endDate, _dxp.account.acqSource _dxp.plan.planID, _dxp.plan.name* & *_dxp.customerID*. 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.**



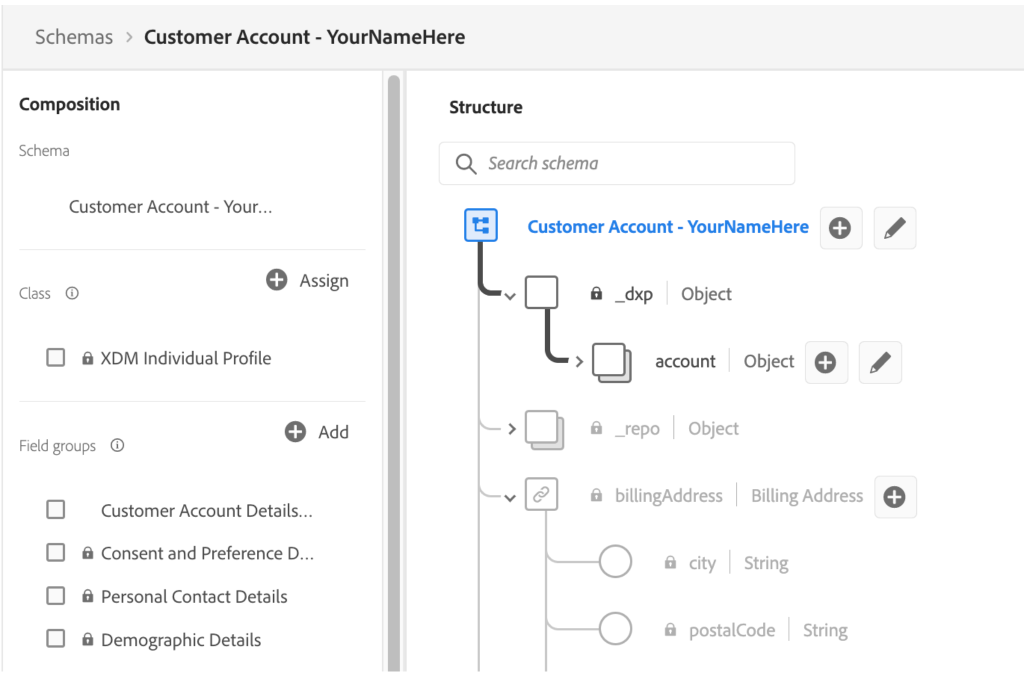
2. Notice the right rail opens with some fields for you to enter. **Create an account object** by filling out

Field Name	Display Name	Type	Assign Field Group
account	*Account*	*Object*	*Customer Account Details - YourNameHere (you'll need to type this in and select the dropdown or hit enter)*



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

Note	Your custom fields will fall under a tenant namespace, denoted by _[TenantName]. Tenant namespaces are used to differentiate custom fields from adobe standards, and to avoid conflict. In this lab we are using _dxp as an example in the screenshots. However as your tenant name is automatically generated from the org you are in, it may not match with _dxp. This is correct and expected.
Note	Note your new custom field group that appears on the left rail under the field group section called *Customer Account Details - YourNameHere.* It appears without a lock icon to show it is custom.



3. **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 *createDate* attribute

Field Name	Display Name	Type	Assign Field Group
createDate	*Create Date*	*dateTime*	*Customer Account Details-YourName Here*

Note	Notice field group has already been assigned to your custom field group because you are working within that field group's object.

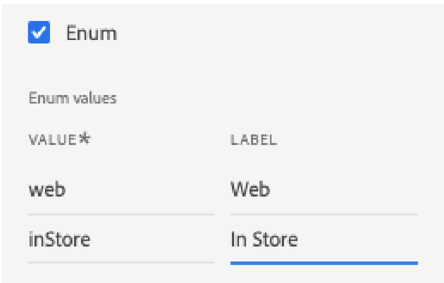
- **Select Apply** at the bottom to post your changes, and then **Save** your schema.
- **Click plus sign** besides account **& fill meta data on right rail** for *endDate*

Field Name	Display Name	Type	Assign Field Group
endDate	*End Date*	*dateTime*	*Customer Account Details-Your Name Here*

- **Select Apply** at the bottom to post your changes, and then **Save** your schema.
- **Click plus sign** besides account **& fill meta data on right rail** for *acqSource*

Field Name	Display Name	Type	Assign Field Group
acqSource	*Acquired Source*	*string*	*Customer Account Details-YourNameHere*

   - **Select Enum** checkbox to add validation for this field at ingestion, as well as suggested labels for segmentation. Add enum values *web;Web, inStore;In Store*

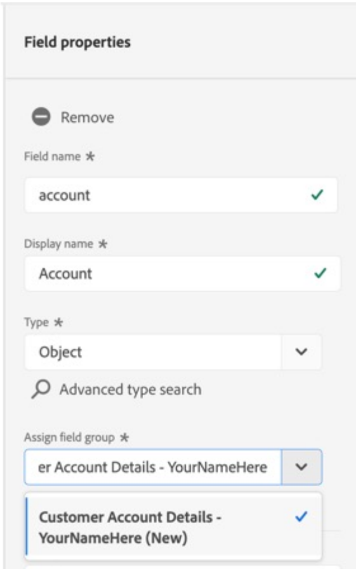


- **Select Apply** at the bottom to post your changes, and then **Save** your schema.

4. Your schema also needs a Plan object with a Plan ID and Name. You can see this in your mapping sheet. These attributes should be included under the *Customer Account Details - YourNameHere field group* field group so that your plan and account details are centralized in one component. **Click the plus sign at the top of your schema** to add another field. **Add a *plan* object.**

Field Name	Display Name	Type	Assign Field Group
plan	*Plan*	*Object*	*Customer Account Details-YourName Here*

Note	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.



- **Select Apply** at the bottom to post your changes, and then **Save** your schema.

5. **Add Child Fields** *planID* and *planName* under your Plan object by **clicking the plus sign** beside the Plan object
   - **Fill meta data on right rail** for plan*ID*

Field Name	Display Name	Type	Assign Field Group
planID	*Plan ID*	*String*	*Customer Account Details - YourName Here*

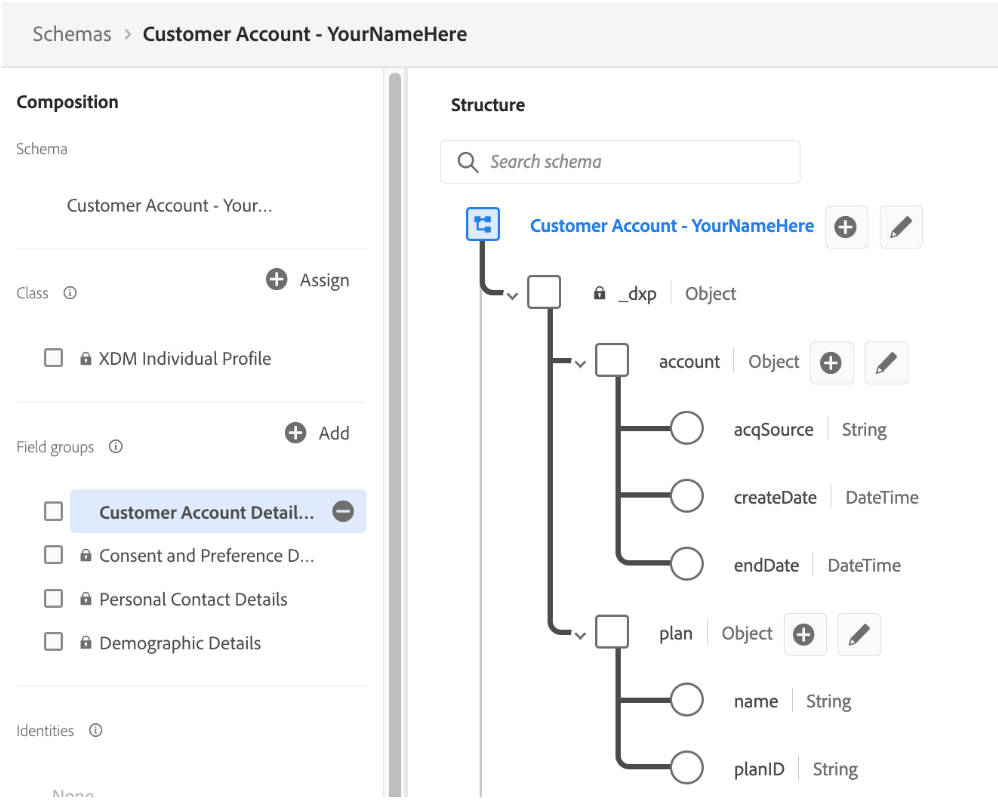
- **Select Apply** at the bottom to post your changes, and then **Save** your schema.

   - Click plus sign besides *Plan* **& Fill meta data on right rail** for *Name*

Field Name	Display Name	Type	Assign Field Group
name	*Name*	*String*	*Customer Account Details - YourNameHere*

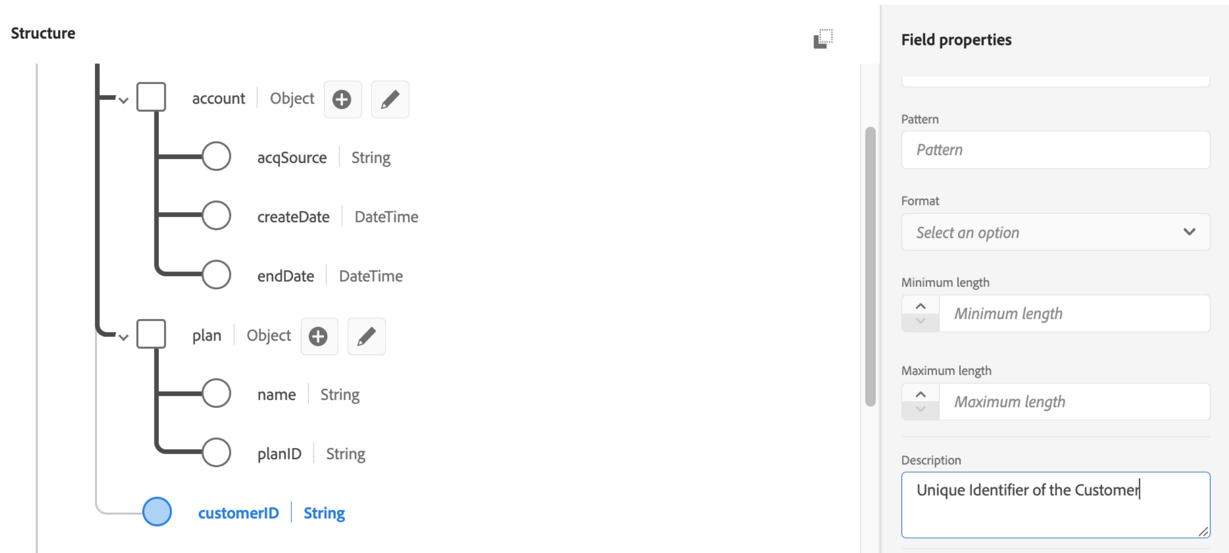
- **Select Enum** checkbox to add validation for this field at ingestion, as well as suggestion list for segmentation Add enum values *basic;Basic,ultimate;Ultimate,pro;Pro*
- **Select Apply** at the bottom to post your changes

6. **Save & Validate.** When you are done with creating the account & plan object with child fields, your Customer Account Details field group should look like this:



7. You need to create a customerID attribute which will serve as your unique primary identity to identify each unique record. Add it to the Customer Account Details - YourNameHere field group.
   - **Click** the plus at the root of your schema

Field Name	Display Name	Type	Assign Field Group	Description
CustomerID	*Customer ID*	*String*	*Customer Account Details*	*Unique Identifier for the customer profile*



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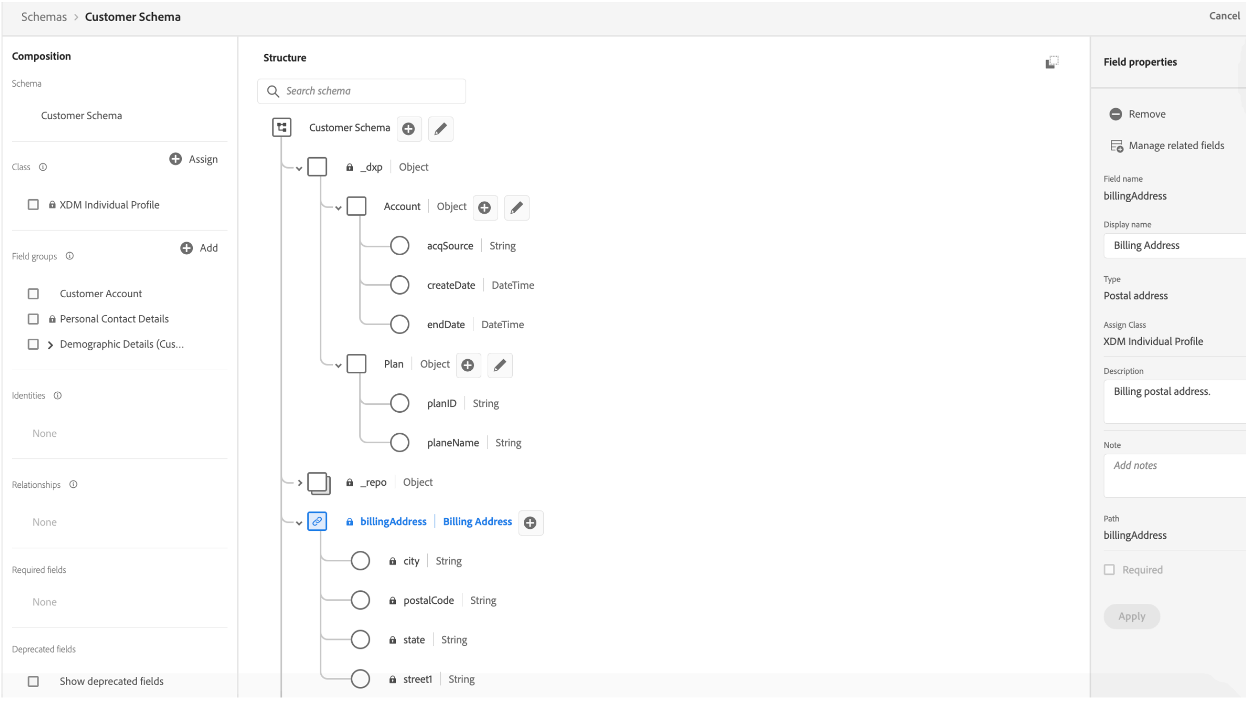
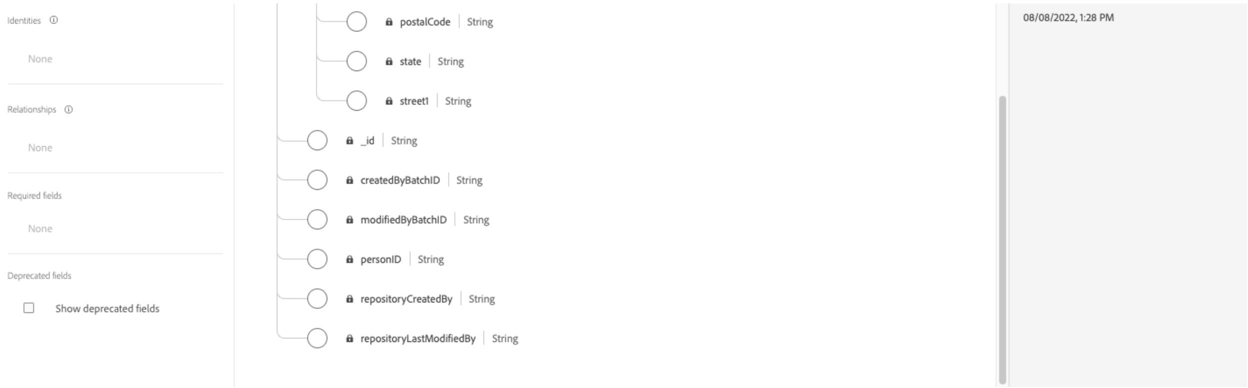
- **Select Apply** at the bottom to post your changes. **Save** your schema.

You finished adding all attributes from your mapping sheet, and your schema is now complete! **Validate** that it looks like the UI screenshot below! You will come back to this schema to mark primary & secondary identities, as well as build a relationship between this schema and the *Plan* schema.




Identities
None
Relationships
None
Required fields
None
Deprecated fields
Show deprecated fields
postalCode | String
state | String
street1 | String
_id | String
createdByBatchID | String
modifiedByBatchID | String
personID | String
repositoryCreatedBy | String
repositoryLastModifiedBy | String
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Adobe Experience Platform Schema Design Identities, Relationships & Union Profile View

Adobe Experience Platform Bootcamp Deep Dive Edition

CONTENTS

LAB OVERVIEW

Learn how to set an identity & a primary identity so that you can build relationships between a profile and a lookup schema. Enable schemas for profile to inspect the union schema view

LEARNING OBJECTIVES

What should you walk away with after taking this Lab?

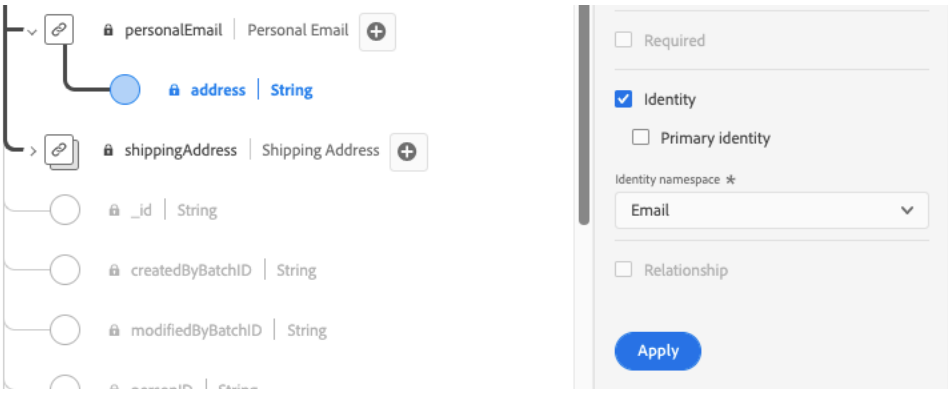
- Declare an identity
- Declare a primary identity
- Build a relationship between two schemas
- Enable a schema for profile & inspect union schema view

1. DECLARE AN IDENTITY & A PRIMARY IDENTITY

You completed the creation of the Customer Account Schema in the UI schema lab. To complete schema config, you must mark the identities that you determined during the "I" step of the SID lab, and build a relationship. Finally, you must enable the schema for profile.

Mark the Personal Email Address Field as an identity.

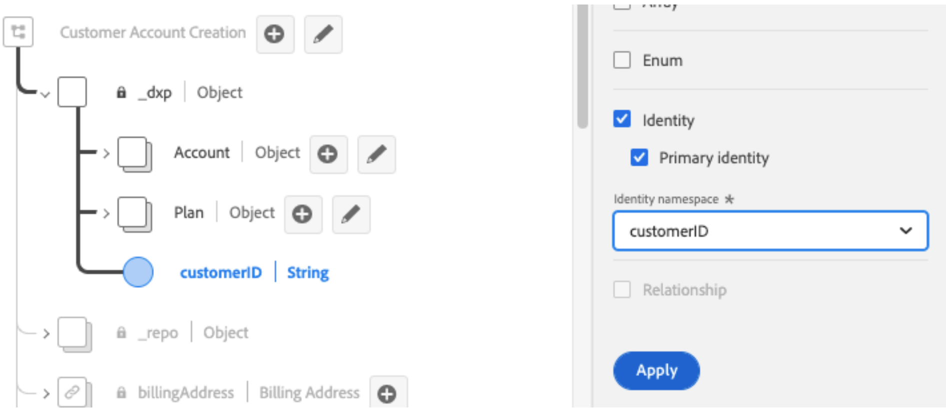
1. **Open** your customer account schema
2. **Select** the personalEmail.address field
3. **Mark** the identity checkbox on the right rail
4. **Select** the Email identity namespace from the dropdown.



5. **Apply & Save** your changes. Validate that a thumbprint shows on your field.

Mark the customer ID Field as a primary identity.

6. **Select** the _dxp.customerID field.
7. **Mark** it as identity and primary identity using the checkboxes on the right rail
8. **Select** the customerID namespace from the dropdown.



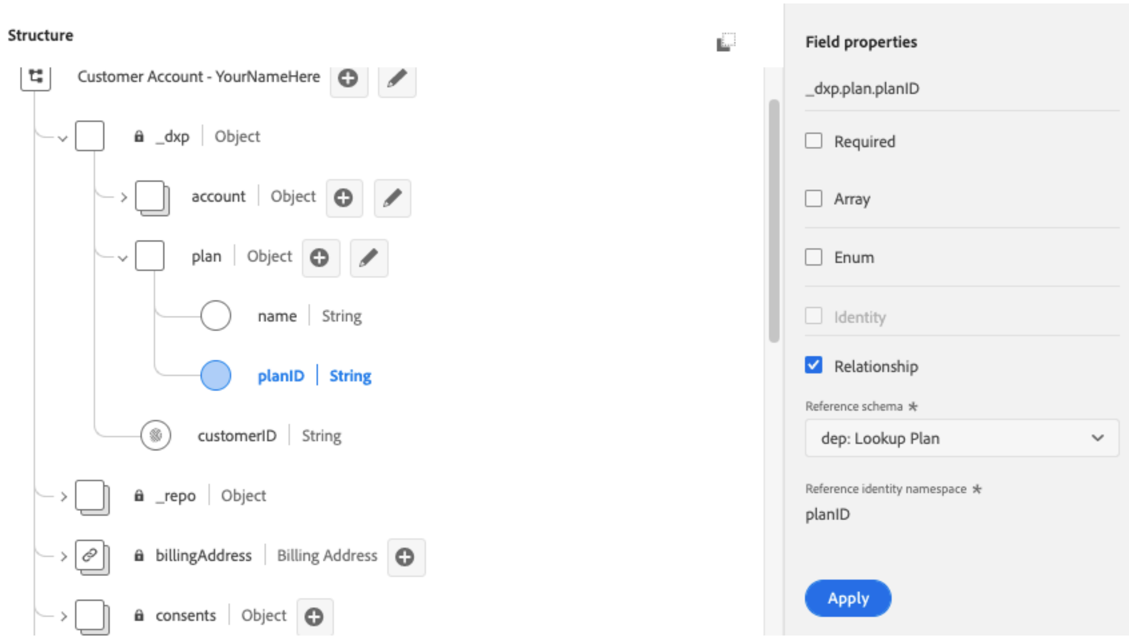
9. **Apply & Save** your changes. Validate that a thumbprint shows on your field.

You have completed the assignment of identities on your Customer Account Schema.

2. BUILD RELATIONSHIPS BETWEEN TWO SCHEMAS

Build a relationship between your Customer Account Schema and the Plan schema.

1. **Select** the PlanID field on the Customer Account - YourNameHere
2. **Check** the relationship checkbox on the right rail
3. **Select** the reference schema: dep: Lookup Plan



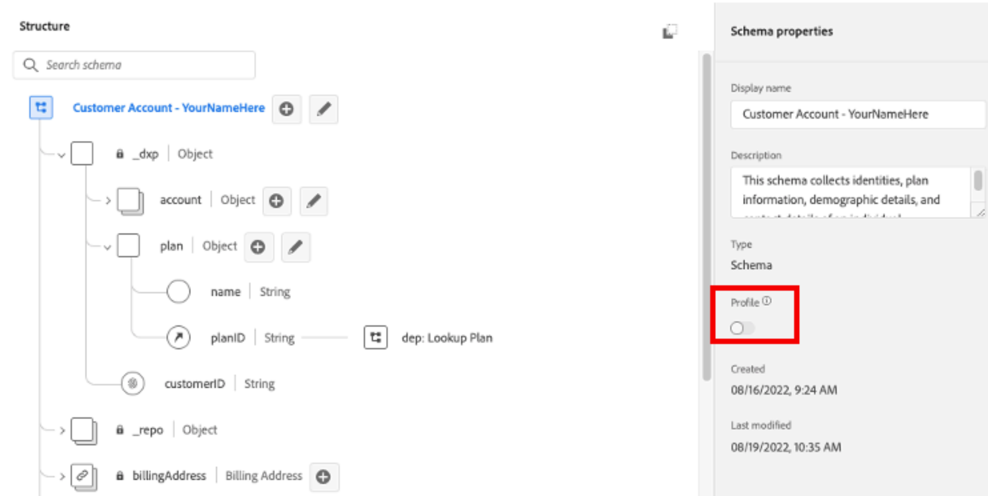
Note	When building a relationship, you don't need to specify the destination property. The primary identity on the destination schema will be used.

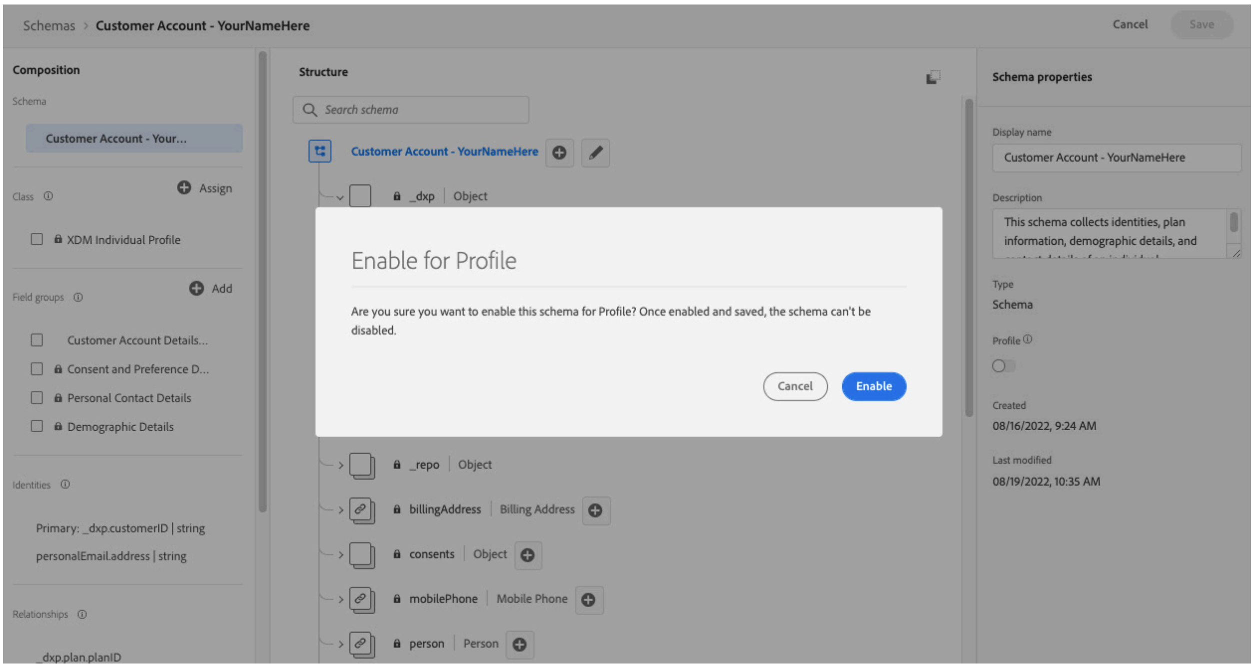
4. **Select** Apply & Save. Validate you see the relationship between planID and the dep: Lookup Plan Schema

3. ENABLE A SCHEMA FOR PROFILE

Real-time Customer Profile merges data from disparate sources to construct a complete view of each individual customer. If you want the data captured by a schema to participate in this process, you must enable the schema for use in Profile.

1. **Open** your Customer Account schema.
2. **Enable** your schema for profile by toggling on the profile toggle on the right rail, and selecting enable

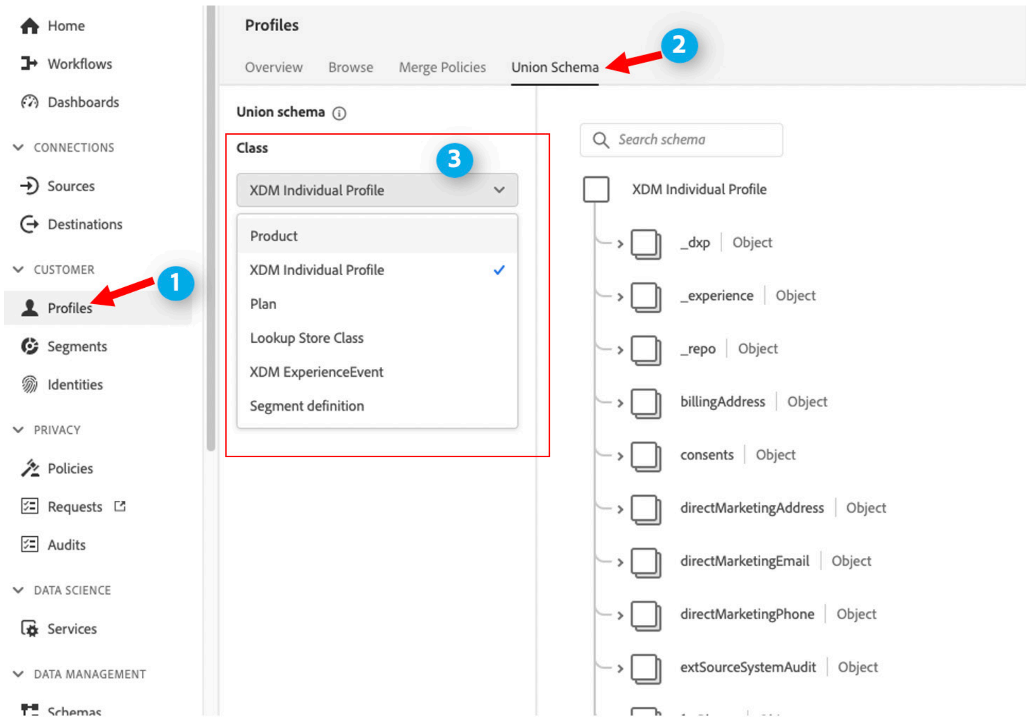




3. **Save** your schema

4. INSPECT YOUR UNION SCHEMA VIEW

1. **Navigate** to **Profiles** on the left navigator
2. **Select** the **Union Schema** tab on the top menu
3. **Select** your individual profile class



4. Notice the schema shown is an aggregate merged view of all profile schemas in your sandbox. Some auto provisioned AJO schemas are included.
5. Browse Unions of different classes to see the union for Experience Event and Specific Lookup classes.