

AT&T CJA HOL LAB GUIDE

February 27, 2024

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GETTING STARTED

1. Login Information

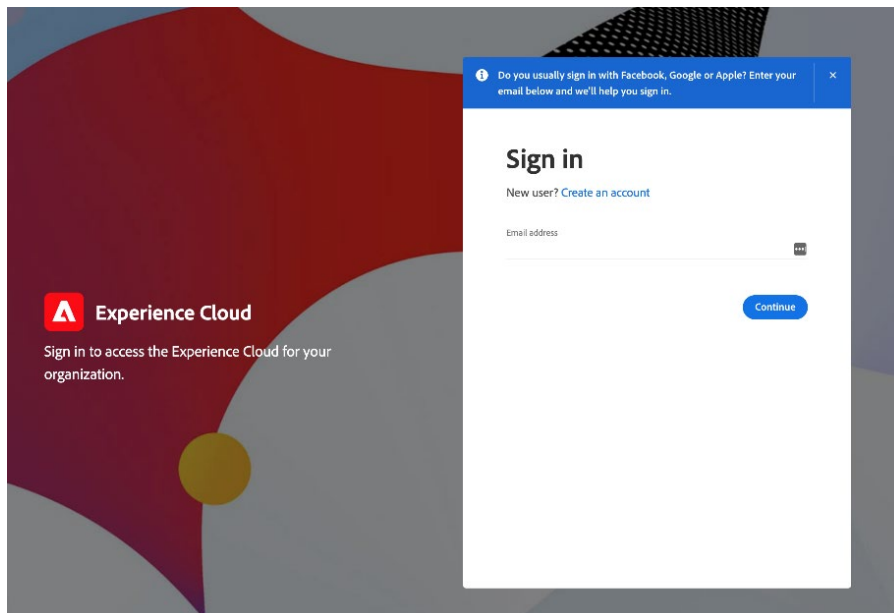
✔ Before proceeding with logging into this lab, please make sure:

- ✔ Use Chrome or Firefox.
- ✔ Sign-out from all Adobe instances that might be open.
- ✔ Do not use your own credentials to access the demo instance for this lab. Instead, you'll use specific credentials provided in this document.

The Hands-on Lab URL:

- <https://experience.adobe.com>

After navigating to the URL above, you must see a screen like this
If you see anything else, then make sure you sign-out, and try again:

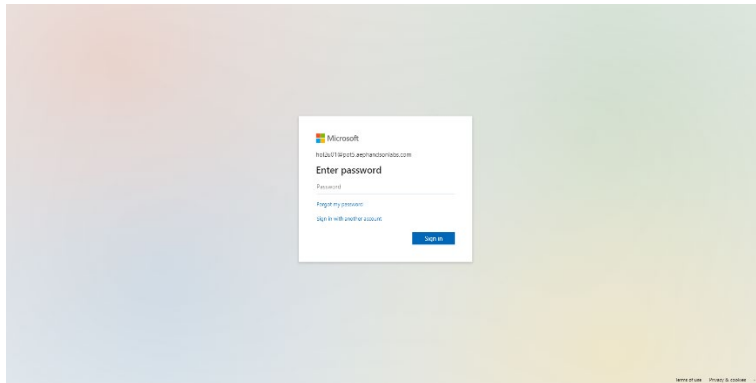


Here are your login credentials for the lab environment.

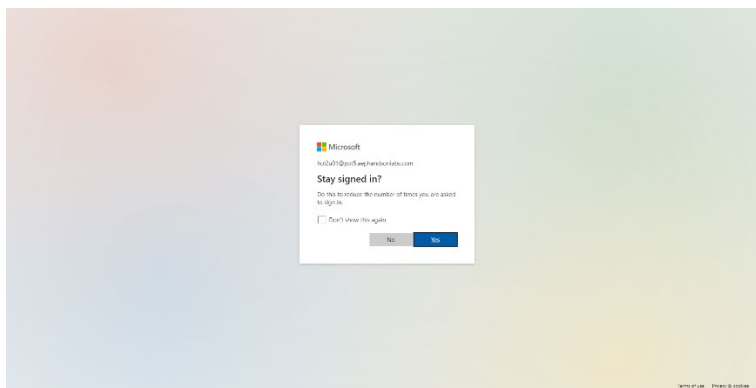
Password for all usernames listed below is: **ATTCJA\$Feb2024**

#	Name	Login
1	Kirsten Leong	attcjaholu01@pot5.aephandsonlabs.com
2	Brock Boyd	attcjaholu02@pot5.aephandsonlabs.com
3	George Hoffman	attcjaholu03@pot5.aephandsonlabs.com
4	Fletcher Whiting	attcjaholu04@pot5.aephandsonlabs.com
5	Sambit Sourav	attcjaholu05@pot5.aephandsonlabs.com
6	Blake Hollingsworth	attcjaholu06@pot5.aephandsonlabs.com
7	Pinak Bhende	attcjaholu07@pot5.aephandsonlabs.com
8	Rockel Williams	attcjaholu08@pot5.aephandsonlabs.com
9	Ken McWilliams	attcjaholu09@pot5.aephandsonlabs.com
10	Redhwan Ahmed	attcjaholu10@pot5.aephandsonlabs.com
11	Mikayla Vogt	attcjaholu11@pot5.aephandsonlabs.com
12	Danny Black	attcjaholu12@pot5.aephandsonlabs.com
13	Neil Jackson	attcjaholu13@pot5.aephandsonlabs.com
14	Jonathan Cromer	attcjaholu14@pot5.aephandsonlabs.com
15	Mark Pursley	attcjaholu15@pot5.aephandsonlabs.com
16	Bradley Green	attcjaholu16@pot5.aephandsonlabs.com
17	Jody Leblanc	attcjaholu17@pot5.aephandsonlabs.com
18	Bobby Taylor	attcjaholu18@pot5.aephandsonlabs.com
19	Hong Li	attcjaholu19@pot5.aephandsonlabs.com
20	Sandhya Ganta	attcjaholu20@pot5.aephandsonlabs.com
21	Amit Mitter	attcjaholu21@pot5.aephandsonlabs.com
22	Open	attcjaholu22@pot5.aephandsonlabs.com
23	Open	attcjaholu23@pot5.aephandsonlabs.com
24	Open	attcjaholu24@pot5.aephandsonlabs.com
25	Open	attcjaholu25@pot5.aephandsonlabs.com

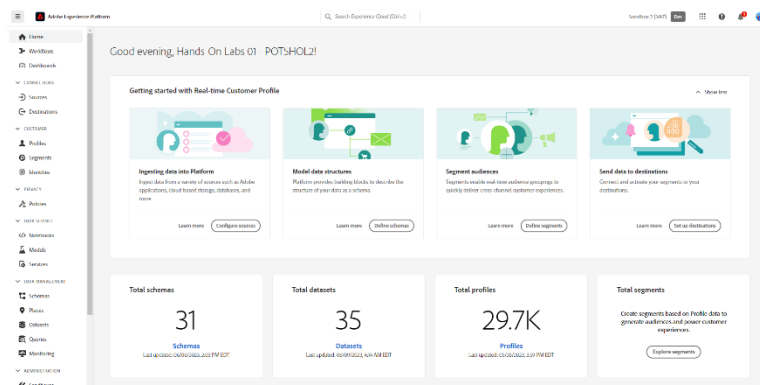
After you enter your assigned username from above (email address) click the 'Continue' button and then you will see the single sign on screen below. We use Microsoft Active Directory so you will see a Microsoft logo and a prompt to enter a password.



Click the 'Sign in' button. If prompted to 'Stay signed in?' you can choose 'Yes' or 'No'.



You should arrive to this screen:



2. Lab Exercise File

Download the below exercise file by clicking on the link below. Save the file at an accessible location in your computer:

Note: the data file to download is only applicable to the exercises on Day 1 for data ingestion.

crm_data_001.csv ([download link](#))

Instructions:

1. Click on file above to download file to a known location on your computer.
2. We will use this file for the Workflows exercise so remember the location where the file was downloaded.

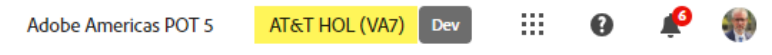
DATA FOUNDATIONS

3. Schemas

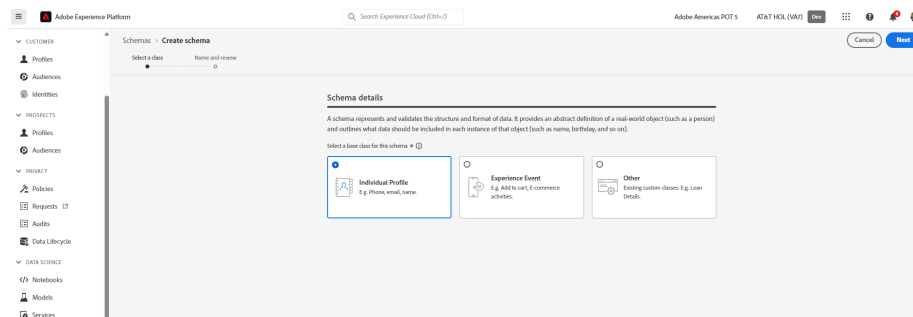
This lab will show you how to construct a new Experience Profile schema which will be needed to load in the new customer profile data.

Instructions:

1. Confirm you are in the AT&T HOL sandbox in the upper right



2. In the left-hand menu find and click **Schemas**
3. Click **Create Schema** on the top right
4. Choose **Individual Profile** as the base class and click **Next**



5. Give the schema a name like **HOL Customer Profile + Your Initials** and click **Finish**
6. We are going to leverage existing field groups to build out schema.

First we are going to add some Adobe built industry specific field groups

- a. Click **Add** next to Fields Groups
- b. Click the checkbox next to **Telecommunications**

- c. Click the check boxes next to **Loyalty Details** and **Telecom Subscriptions**

Add field groups ☒ Use existing field groups ☐ Create new field group

Cancel **Add field groups**

▼ Industry

- ☐ Retail
- ☐ Financial services
- ☐ Travel and hospitality
- ☐ Healthcare
- ☒ Telecommunications

Search field

Industry: Telecommunications x

☒	NAME	POPULARITY	INDUSTRIES	OWNER	T	DESCRIPTION	LAST MODIFIED
☒	Loyalty Details	193	Retail, Travel and hospitality, Automotive, Health and life sciences, High tech,...	Adobe	-	Loyalty details such as ID, points, join date, program, and status.	02/15/2024, 2:59 PM
☐	User Account Details	151	Retail, Financial services, Travel and hospitality, Telecommunications, Automot...	Adobe	-	-	02/15/2024, 2:59 PM
☒	Telecom Subscription	46	Telecommunications	Adobe	-	Collects all generic details related to a customer's telecom subscription plan,...	02/15/2024, 2:59 PM

2 field groups selected

NAME

Loyalty Details X

Telecom Subscription X

- d. Click **Add field groups** button

7. Next we are going to add some previously created custom field groups

- Click **Add** next to Fields Groups
- Uncheck the checkbox next to **Telecommunications**
- Find and click the checkboxes next to **Customer Info** and **Identities**

Add field groups ☒ Use existing field groups ☐ Create new field group

Cancel **Add field groups**

▼ Industry

- ☐ Retail
- ☐ Financial services
- ☐ Travel and hospitality
- ☐ Healthcare
- ☐ Telecommunications

Search field

☒	NAME	POPULARITY	INDUSTRIES	OWNER	T	DESCRIPTION	LAST MODIFIED
☒	Customer Info	-	-	Customer	-	-	02/19/2024, 6:15 PM
☐	Loyalty Details (Customized-1702568402963) (extension of: Loyalty Details)	-	-	Customer	-	Loyalty details such as ID, points, join date, program, and status.	12/14/2023, 10:40 AM
☐	CustomerInfo	-	-	Customer	-	-	12/14/2023, 10:37 AM
☐	Loyalty Details (Customized-1702568106296) (extension of: Loyalty Details)	-	-	Customer	-	-	12/14/2023, 10:37 AM
☐	Identities Main Profile	-	-	Customer	-	Identities Main Profile	12/11/2023, 11:23 PM
☐	Propensity Details Main	-	-	Customer	-	Propensity Details Main	12/11/2023, 11:23 PM
☐	Reward Details Main	-	-	Customer	-	Reward Details Main	12/11/2023, 11:23 PM
☒	Identities	-	-	Customer	-	-	12/11/2023, 12:28 PM
☐	Custom XDM mixin for dataset cjm_qisacelcjm_reporting_agg inbound_agg_v2. Random identifier: eb0819b-df3f-496c-91c3-a81dc694dde	-	-	Customer	-	Custom mixin created as a result of Alter Add Column	12/07/2023, 11:33 AM
☐	Custom XDM mixin for dataset cjm_qisacelcjm_reporting_agg inbound_agg_v2. Random identifier: eb0819b-df3f-496c-91c3-a81dc694dde	-	-	Customer	-	Custom mixin created as a result of Alter Add Column	12/07/2023, 11:33 AM

2 field groups selected

NAME

Customer Info X

Identities X

- d. Click **Add field groups** button

8. Your schema should look like this and then click the Save button in the upper right

Schemas > HOL Customer Profile BDC

Structure Labels

Composition

Schema

HOL Customer Profile BDC

Class

XDM Individual Profile

Field groups

Identities

Customer Info

Telecom Subscription

Loyalty Details

Relationships

Required fields

Search schema

▼ HOL Customer Profile BDC

- adobeamericaspots | Object
- repo | Object
- loyalty | Object
- telecomSubscription | Object
- id | String
- createdByBatchID | String
- modifiedByBatchID | String
- personID | String
- repositoryCreatedBy | String
- repositoryLastModifiedBy | String

Show display names for fields

Schema properties

Display name

HOL Customer Profile BDC

Description

Enter description

Type

Schema

Profile

Created

02/26/2024, 11:48 AM

Last modified

02/26/2024, 11:48 AM

Save

9. Your schema is now created!

4. Datasets

This lab will show you how to create a dataset from the schema you created in the previous lab exercise.

Instructions:

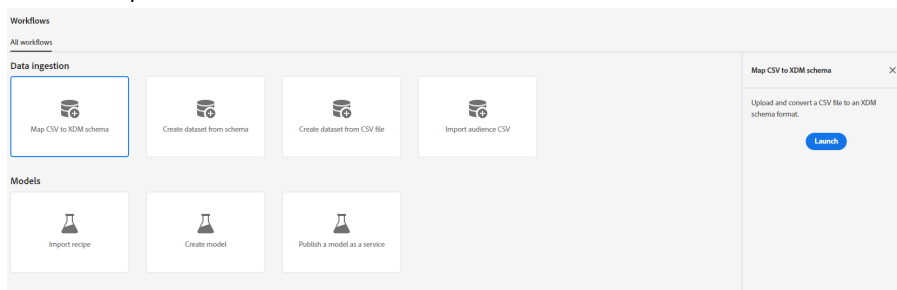
1. In the left-menu find and click **Datasets**
2. Click **Create dataset** from top right
3. Choose **Create dataset from schema**
4. Search and select the schema you created from the previous lab. Click the Next button in upper right
5. Name your dataset something like **HOL Customer Profile Dataset + Your Initials** and click the **Finish** Button
6. Your dataset is now created and ready for data to be loaded in the next lab exercise!

5. Workflows

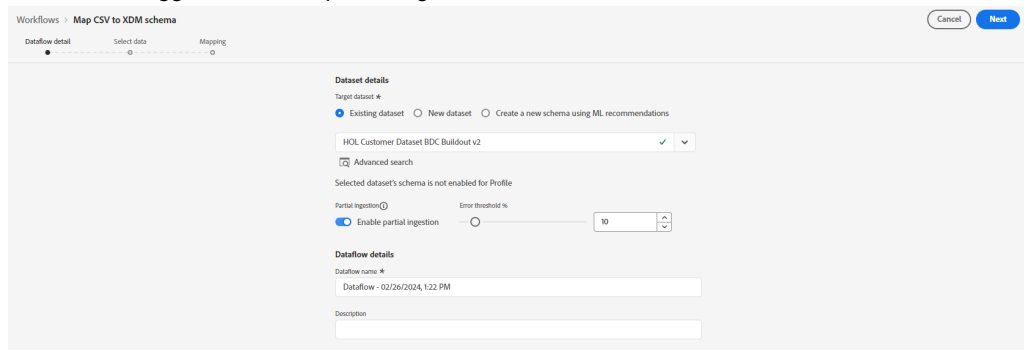
This lab will show how you can load data from the provided csv file into the data set you created in the previous exercise.

Instructions:

1. In the left-menu find and click Workflows
2. Choose Map CSV to XDM schema and click the Launch button



3. For the dataset details screen do the following:
 - a. For the target dataset keep the default selection on Existing dataset. Search using your initials and select the dataset that you created in the pervious exercise.
 - b. Turn on the toggle for Enable partial ingestion and increase the Error threshold to 10%

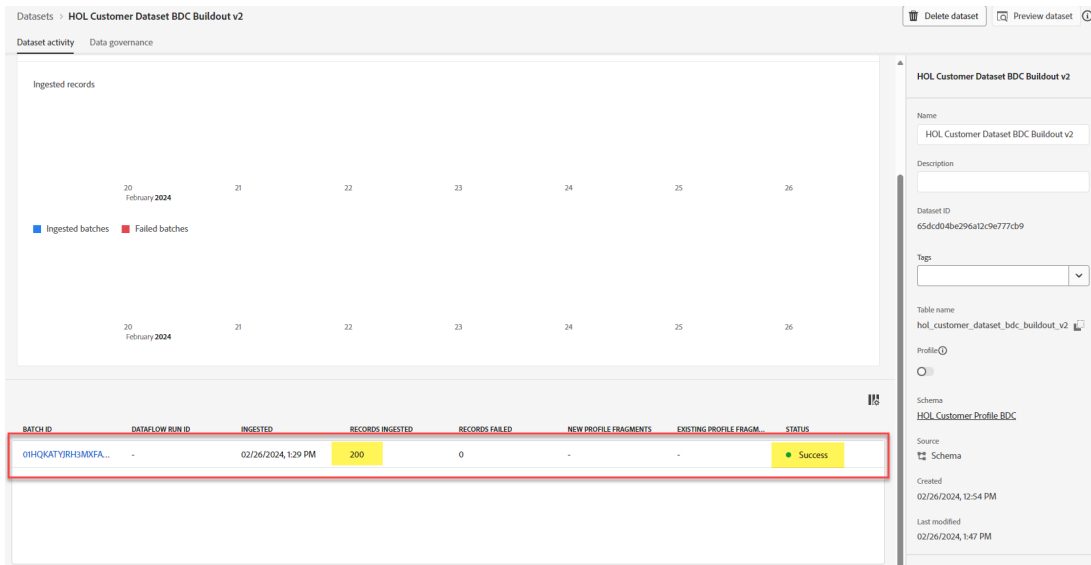


- c. Click the Next button in the upper right
4. Download the CVS file to your computer and put it a known location. Chose the file from the Choose files button or drag and drop the file into the file landing zone.

- Once the file loads observe the data preview and click the Next button

- Next we need to review and confirm the mapping from the csv to the dataset schema
 - Since our dataset schema does not include postal address fields we need to remove the following fields from the mapping: **country**, **zip** and **street address**. Click this icon  at the end of each row to remove the field from the mapping.

- Map historicalpoints to loyalty.points by clicking the light bulb icon and select manually
 - Click the Finish button in upper right
- Now we can go back to the dataset to see if the import was successful.
 - Find and select Datasets from the left-side menu
 - Search for the dataset that you selected for the data load by searching for your initials
 - The status may say **Processing** and if so you might have to check back in a few minutes, but once completed your Dataset activity screen will look like below with a Status of **Success** and **200** Records ingested:



11. You have now completed the entire process of data ingestion with AEP!

6. Governance

Instructions:

1. In the left-hand menu, navigate to "Datasets". Verify you're on the "Browse" tab. Scroll down and select the "Serasa Profile Dataset" dataset.
2. Click "Data governance" tab, type "address" in the search box, select "address" in the FIELD NAME list. Click the pencil icon in the right next to "Apply access and data governance labels"
3. In the Edit governance labels overlay, expand "IDENTITY LABELS". Select "I1" and click the "Save changes" button\

Congratulations, you applied your first data usage label to a dataset field. Simple, right?

1. In the left-hand menu, navigate to Policies. Verify you're on the "Browse" tab. Click "+ Create policy" in top right corner\
2. In the "Choose type of policy" dialog make sure the "Data governance policy" radio button is selected and select the "Continue" button.
3. Under the Policy details, enter name "Custom Policy <your assigned number>". Under Select governance labels, select "I1". On the right-hand side, make sure "Contains all of the labels" radio button is selected. Click "Next" button in the top right corner.\
4. Select "Export to Third Party". Click "Next" button in the top right corner.\
5. Review the policy and click "Finish".\

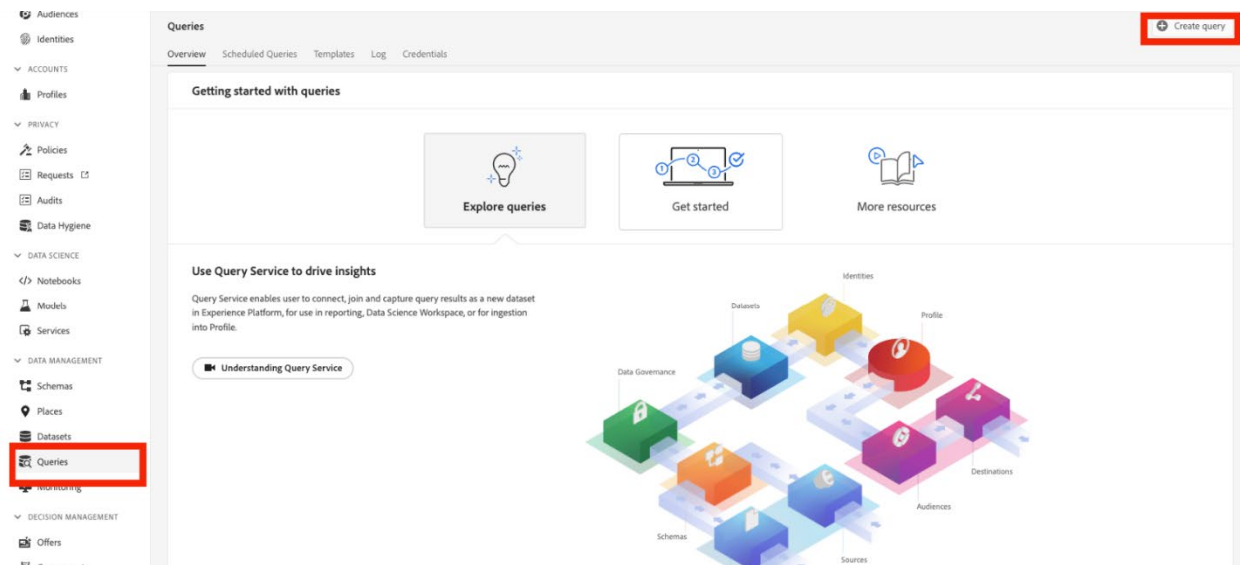
Congratulations, you created a custom data usage policy.\

7. Query Service

Query Editor #query-editor

Data Distiller provides a user interface that can be used to write and execute queries, view previously executed queries, and access queries saved by users within your organization. The Query Editor enables you to write and execute queries without using an external client.

To start this exercise, click on Queries in the left side navigation then click on Create Query.



Let's test and make sure that we are connected to run a query.

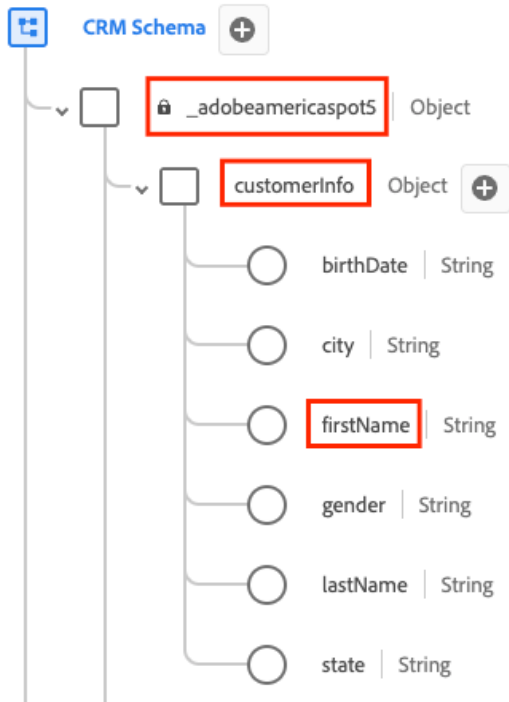
Type in the following query:

```
SELECT COUNT(_adobeamericaspot5.customerInfo.firstName)
FROM crm_dataset;
```

Then run the query. You should get a count of 1,938 in the results tab.

The query path references directly from the AEP Schema:

“_adobeamericaspot5.customerInfo.firstName”



8. APIs

Adobe Experience Platform is built on open APIs.

Multiple endpoints to list (GET), lookup (GET), edit (PUT and/or PATCH), and delete (DELETE)

API key required as header in all API requests

Access tokens required in the Authorization header of all API calls

[API Documentation](#)

[Postman collections](#)