

Configure a dataset to capture consent and preference data

In order for Adobe Experience Platform to process your customer consent/preference data, that data must be sent to a dataset whose schema contains fields related to consents and other permissions. Specifically, this dataset must be based on the [!DNL XDM Individual Profile] class, and enabled for use in [!DNL Real-time Customer Profile].

This document provides steps for configuring a dataset to process consent data in Experience Platform. For an overview of the full workflow for processing consent/preference data in Platform, refer to the [consent processing overview](#).

[!IMPORTANT]

The examples in this guide use a standardized set of fields to represent customer consent values, as defined by the [Consents & Preferences XDM data type](#). The structure of these fields is intended to provide an efficient data model to cover many common consent-collection use cases.

However, you can also define your own mixins to represent consent according to your own data models. Please consult with your legal team to get approval for a consent data model that fits your business needs, based on the following options:

- The standardized consent mixin
- A custom consent mixin created by your organization
- A combination of the standardized consent mixin and additional fields provided by a custom consent mixin

Prerequisites

This tutorial requires a working understanding of the following components of Adobe Experience Platform:

- [Experience Data Model \(XDM\)](#): The standardized framework by which [!DNL Experience Platform] organizes customer experience data.
 - [Basics of schema composition](#): Learn about the basic building blocks of XDM schemas.
- [Real-time Customer Profile](#): Consolidates customer data from disparate sources into a complete, unified view while offering an actionable, timestamped account of every customer interaction.

[!IMPORTANT]

This tutorial assumes that you know the [!DNL Profile] schema in Platform that you want to use to capture customer attribute information. Regardless of the method you use to collect consent data, this schema must be [enabled for Real-time Customer Profile](#). In addition, the schema's primary identity cannot be a directly identifiable field that is prohibited from use in interest-based advertising, such as an email address. Consult your legal counsel if you are unsure which fields are restricted.

Consents & Preferences mixin structure {#structure}

The [!UICONTROL Privacy/Personalization/Marketing Preferences (Consents)] mixin (hereinafter referred to as the "Consents & Preferences mixin") provides standardized consent fields to a schema. Currently, this mixin is only compatible with schemas based on the [!DNL XDM Individual Profile] class.

The mixin provides a single object-type field, `xdm:consents`, whose sub-properties capture a set of standardized consent fields. The following JSON is an example of the kind of data `xdm:consents` expects upon data ingestion:

```
{
  "xdm:consents": {
    "xdm:collect": {
      "xdm:val": "y",
    },
    "xdm:adID": {
      "xdm:val": "VI"
    },
    "xdm:share": {
      "xdm:val": "y",
    },
    "xdm:personalize": {
      "xdm:content": {
        "xdm:val": "y"
      }
    },
    "xdm:marketing": {
      "xdm:preferred": "email",
      "xdm:any": {
        "xdm:val": "y"
      },
      "xdm:push": {
        "xdm:val": "n",
        "xdm:reason": "Too Frequent",
        "xdm:time": "2019-01-01T15:52:25+00:00"
      }
    },
    "xdm:idSpecific": {
      "email": {
        "jdoe@example.com": {
          "xdm:marketing": {
            "xdm:email": {
              "xdm:val": "n"
            }
          }
        }
      }
    },
    "xdm:metadata": {
      "xdm:time": "2019-01-01T15:52:25+00:00"
    }
  }
}
```

[!NOTE]

For more information on the structure and meaning of the sub-properties in `xdm:consents`, see the overview on the [Consents & Preferences data type](#).

Add the Consents & Preferences mixin to your [!DNL Profile] schema {#add-mixin}

In the Platform UI, select **[!UICONTROL Schemas]** in the left navigation, then select the **[!UICONTROL Browse]** tab to display a list of existing schemas. From here, select the name of the [!DNL Profile]-enabled schema that you want to add consent fields to. The screenshots in this section use the "Loyalty Members" schema built in the [schema creation tutorial](#) as an example.

NAME	TYPE	DATASETS	IDENTITIES	RELATIONSHIPS	ENABLED FOR PROFILE	OWNER	CLASS	BEHAVIOR	LAST MODIFIED
Loyalty Members	Schema	-	-	-	Enabled	Customer	XDM Individual Profile	Record	1/11/2021, 12:27 PM

[!TIP]

You can use the workspace's search and filtering capabilities to help find your schema easier. See the guide on [exploring XDM resources](#) for more information.

The [!DNL Schema Editor] appears, showing the structure of the schema in the canvas. On the left side of the canvas, select **[!UICONTROL Add]** under the **[!UICONTROL Mixins]** section.

The screenshot shows the Adobe Experience Platform interface for configuring the 'Loyalty Members' schema. The 'Composition' panel on the left has an 'Add' button circled in green. The 'Structure' panel in the center shows a tree view of the schema's fields, including _tenantId, _repo, faxPhone, homeAddress, homePhone, mobilePhone, person, personalEmail, _id, createdByBatchID, modifiedByBatchID, and personID. The 'Schema properties' panel on the right shows the display name 'Loyalty Members' and a description: 'Describes customers who are members of a loyalty program.' The 'Type' is set to 'Schema' and the 'Profile' is turned on.

The **[!UICONTROL Add mixin]** dialog appears. From here, select **[!UICONTROL Privacy/Personalization/Marketing Preferences (Consents)]** from the list. You can optionally use the search bar to narrow down results to locate the mixin easier. Once the mixin is selected, select **[!UICONTROL Add mixin]**.

The screenshot shows the 'Add mixin' dialog in the Adobe Experience Platform interface. The search bar contains 'Consent'. The table below lists the selected mixin 'Privacy/Personalization/Marketing Preferences (Consents)'. The 'Add mixin' button is circled in green.

NAME	POPULARITY	OWNER	DESCRIPTION	LAST MODIFIED
<input checked="" type="checkbox"/> Privacy/Personalization/Marketing Preferences (Consents) ^{beta}	-	Adobe	This schema captures privacy, personalization and marketing ...	1/6/2021, 3:32 PM

The canvas reappears, showing that the **consents** field has been added to the schema structure. Select **[!UICONTROL Save]** to finalize the changes to the schema.

The screenshot displays the Adobe Experience Platform interface for editing a schema named 'Loyalty Members'. The interface is divided into several sections:

- Composition:** Shows the schema's composition, including classes (XDM Individual Profile), mixins (Privacy/Personalization/Marketing Preferences (Consents)), and relationships (None).
- Structure:** A tree view of the schema's fields. The 'consents' field is highlighted with a green box. Other fields include _tenantid (Object), _repo (Object), faxPhone (Phone number), homeAddress (Postal address), homePhone (Phone number), mobilePhone (Phone number), person (Person), personalEmail (Email address), _id (String), createdByBatchID (String), and modifiedByBatchID (String).
- Mixin properties:** Details for the 'Privacy/Personalization/Marketing Preferences (Consents)' mixin, including its display name, description, type (Mixin), and creation/modification dates.

A 'Save' button is circled in green in the top right corner of the interface.

If the schema you edited is used by the [!UICONTROL Profile Dataset] specified in your Platform Web SDK edge configuration, that dataset will now include the new consent fields. You can now return to the [consent processing guide](#) to continue the process of configuring Experience Platform to process consent data.

If you have not created a dataset for this schema, follow the steps in the next section.

Create a dataset based on your consent schema {#dataset}

Once you have created a schema with consent fields, you must create a dataset that will ultimately ingest your customers' consent data. This dataset must be enabled for [!DNL Real-time Customer Profile].

To begin, select [!UICONTROL Datasets] in the left navigation, then select [!UICONTROL Create dataset] in the top-right corner.

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NAME	CREATED ↓	SOURCE	SCHEMA	LAST BATCH STATUS	LAST UPDATED
Loyalty Members	1/2/2021, 5:00 AM	Schema	Loyalty Members	Success	1/2/2021, 5:02 AM
Loyalty Members May 2019	12/17/2020, 11:23 AM	Schema	Loyalty Members	Canceled	-
Loyalty Details	12/16/2020, 9:50 PM	Schema	Loyalty Details	Success	1/4/2021, 10:26 AM
Retail Sales	12/16/2020, 4:57 PM	Schema	Retails Sales Schema	Canceled	12/16/2020, 5:24 PM
Properties	12/16/2020, 12:20 PM	Schema	Property	Success	12/23/2020, 1:57 PM

1 of 1 pages

5 Datasets

129 MB Total storage used

Most recently updated

Loyalty Members	1/4/2021
Loyalty Members May...	1/4/2021
CSV Ingestion Dataset ...	1/2/2021
Profile Export For Dest...	12/30/2020
Properties	12/17/2020

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On the next page, select **[!UICONTROL Create dataset from schema]**.

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Datasets > Create dataset

Create dataset from schema Create dataset from CSV file

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The **[!UICONTROL Create dataset from schema]** workflow appears, starting at the **[!UICONTROL Select schema]** step. In the provided list, locate one of the consent schemas that you created earlier. You can optionally use the search bar to narrow down results and locate your schema easier. Select the radio button next to the desired schema, then select **[!UICONTROL Next]** to continue.

The screenshot shows the 'Create dataset from schema' workflow in Adobe Experience Platform. The 'Select schema' step is active. A search bar contains 'Loyalty M'. A table lists available schemas, with 'Loyalty Members' selected. A details panel on the right shows the schema's metadata.

NAME	TYPE	ENABLED FOR PROFILE	OWNER	CLASS	BEHAVIOR	LAST MODIFIED
Loyalty Members	Schema	Enabled	Customer	XDM Individual Profile	Record	1/11/2021, 3:29 PM

Details for 'Loyalty Members':

- Name: Loyalty Members
- Description: Describes customers who are members of a loyalty program.
- Class: XDM Individual Profile
- Behavior: Record
- Profile: Enabled
- Created: 1/11/2021, 12:27 PM
- Last modified: 1/11/2021, 3:29 PM

The **Configure dataset** step appears. Provide a unique, easily identifiable name and description for the dataset before selecting **Finish**.

The screenshot shows the 'Configure dataset' step. The 'Name' field is filled with 'Customer Consent Profile Schema' and the 'Description' field is filled with 'Profile schema containing customer consent information.' Both fields have green checkmarks. The 'Finish' button is highlighted.

Name *

Customer Consent Profile Schema ✓

Description

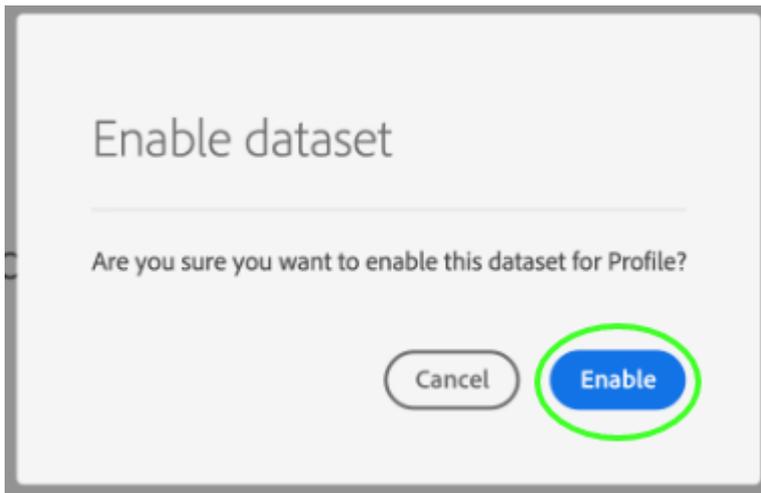
Profile schema containing customer consent information. ✓

The details page for the newly created dataset appears. If the dataset is based on your time-series schema, then the process is complete. If the dataset is based on your record schema, the final step in the process is to enable the dataset for use in **Real-time Customer Profile**.

In the right rail, select the **Profile** toggle.

The screenshot shows the Adobe Experience Platform interface for configuring a dataset. The main content area displays a message: "No batches have been added" with an open box icon. The right-hand panel shows the configuration for the "Customer Consent Profile Schema" dataset. Key details include: Name: Customer Consent Profile Schema; Description: Profile schema containing customer conse...; Dataset ID: 5f5ce2376014fd18db988c5a; Table name: customer_consent_profile_schema; Profile: Loyalty Members (selected); Schema: Loyalty Members; Source: Schema; Created: 1/11/2021, 3:41 PM; Last modified: 1/11/2021, 3:41 PM. A green circle highlights the "Profile" dropdown menu.

Finally, select **[!UICONTROL Enable]** in the confirmation popover to enable the schema for **[!DNL Profile]**.



The dataset is now saved and enabled for use in **[!DNL Profile]**. If you are planning using the Platform Web SDK to send consent data to Profile, you must select this dataset as the **[!UICONTROL Profile Dataset]** when setting up your [edge configuration](#).

Next steps

By following this tutorial, you have added consent fields to a **[!DNL Profile]**-enabled schema, whose dataset will be used to ingest consent data using the Platform Web SDK or direct XDM ingestion.

You can now return to the [consent processing overview](#) to continue configuring Experience Platform to process consent data.