

Progressive Profiling

Progressive profiling helps you improve the user experience by gathering the user's data gradually. Instead of a huge overwhelming form asking for all details, progressive profiling uses shorter and multiple sequential forms. This approach focuses on collecting only the important information from a user that is required at that moment.

With progressive profiling, you understand your users more accurately, about what information they can share comfortably.

You can ask a user to provide only the minimal details, such as name and email address, during the registration. The type of information provided during registration can vary depending on the type of information or service for which a user is requesting.

The user can provide more details over time as and when performing a specific action. This in turn simplifies the registration and login experiences for users.

For example,

User Action	Information Required from a User
Registration	Name and Email Address
Search for an insurance policy	Contact number and city
Buy an insurance	Date of birth and postal address

To configure progressive profiling for this example scenario, perform the following tasks in Self Service Password Reset:

- ♦ [“Configuring the New User Registration Module” on page 1](#)
- ♦ [“Configuring Profiles” on page 2](#)

Configuring the New User Registration Module

- 1 Log in to Self Service Password Reset at `https://dns-name/sspr` as an administrator.
- 2 In the toolbar, click your name.
- 3 Click **Configuration Editor**.
- 4 Click **Modules > Public > New User Registration > New User Profile > default**.
- 5 Configure the first name, last name, and email ID.

- 6 Enable the New User Registration module:
 - 6a Click **Modules > Public > New User Registration > New User Settings**.
 - 6b Select **Enable New User Registration**.
- 7 In the toolbar, click **Save changes**.

With this configuration, a user needs to provide only the first name, last name, and email ID while registering.

Configuring Profiles

Perform the following actions:

- 1 Modify the default profile to collect LDAP attributes for the user's contact number and the name of the city. If a user has already provided this information, the user does not require to provide it again.
For more information see, [Modifying the Default Profile](#).
- 2 Add another profile to collect LDAP attributes for the user's date of birth and postal address.
For more information see, [Adding a New Profile](#).

This configuration enables you with collecting the relevant user information as and when required. The user does not need to share the date of birth and postal address while performing a search for an insurance policy. When the user decides to buy a policy, you collect this information.

Modifying the Default Profile

- 1 Log in to Self Service Password Reset at <https://dns-name/sspr> as an administrator.
- 2 In the toolbar, click your name.
- 3 Click **Configuration Editor**.
- 4 Click **Modules > Authenticated > Update Profile > Update Profile Profiles > default**.
- 5 In **LDAP Search Filter**, specify `(&(! (mobile=*))(! (city=*))(! (homepostaladdress=*))(! (Version=* )))`.
- 6 In the **Update Profile Form** section, add contact number and city.
- 7 In the toolbar, click **Save changes**.

Adding a New Profile

- 1 Log in to Self Service Password Reset at <https://dns-name/sspr> as an administrator.
- 2 In the toolbar, click your name.
- 3 Click **Configuration Editor**.
- 4 Click **Modules > Authenticated > Update Profile > Update Profile Profiles > (Edit List)**.
- 5 Click **Add Profile** and specify a name for the profile.
- 6 Click **OK**.
- 7 In **LDAP Search Filter**, specify `( | ((objectClass=person) (&(mobile=*)(city=*)(! (homepostaladdress=* )))))`.
- 8 In the **Update Profile Form** section, in addition to the contact number and city, add the date of birth and postal address.

9 In the toolbar, click **Save changes**.

When filling up the postal address and date of birth details on this form, the user sees the contact number and city that were provided earlier.

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