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.

Sample Use Case

The following are some sample use cases of progressive profiling:

Use Case 1: An E-commerce website requests users to specify name and email address during the registration. Later, when the user tries to purchase any item and during payment, other details are prompted, such as phone number and address.

For understanding the flow of configuration for E-commerce use case and end-user actions refer to the video:

http://www.youtube.com/watch?v=zxqTEV2Wz7E

Use Case 2: An Insurance company wants to gather user information based on action as follows:

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 the above use case 1 and 2, perform the following tasks in Self Service Password Reset:

- "Configuring the New User Registration Module" on page 2
- "Configuring Profiles" on page 2

Use Case 3: Self Service Password has an ability to invoke the URL of a specific profile to the user for updating the profile when performing a specific action. For more information see "Invoke the Update Profile URL" on page 3.

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

To add 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.

Invoke the Update Profile URL

Using the **Update Module** module, you can add as many profiles as you require for your environment. Additionally, you can define different settings for each profile to get different information from user that defined in each profile when carrying out a particular task. For more information on how to add a new profile, see "Adding a New Profile" on page 3.

You can invoke the URL of a specific profile to update user's profile when they are trying to carry out a particular task, rather than repeatedly updating the profile by using the **Update Profile** option available on the Main Menu of Self-Service Password Reset.

For example, you have created two new profiles (empdetails and empaddress) in the Update Profile Profiles Module for a group of people who wants to access an insurance website.

An insurance website requests users to specify their name and email address during registration. Later, when the user tries to access or buy an insurance policy, empdetails and empaddress details are prompted. The following are some scenarios of updating profile on insurance website by invoking the specific profile URL:

Scenario 1: When the user wants to search for an insurance policy, they are required to provide empdetails information, such as phone number and city. You can invoke the URL of the empdetails profile to request users for updating their data directly to access an insurance policy.

Scenario 2: When the user wants to buy an insurance policy, they are required to provide empaddress information, such as Date of birth and postal address. You can invoke the URL of the empaddress profile to request users for updating their data to buy an insurance policy.

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