

Getting Started Steps

Version 11

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Getting started steps power the yellow Getting Started widget on the [My Activity Stream](#) page. You can set multiple steps with tasks that each user needs to accomplish to complete their profile. This is great for onboarding new employees because it walks them through the intranet and lets them become more comfortable with various features. Getting started steps also help employees complete their profile with important information.

GETTING STARTED

75% complete

- Complete your profile
- ✓ Add profile photo
- ✓ Set your preferences
- ✓ Join a space

The getting started steps are tied to top level user [Roles](#) . Each role can have its own set of getting started steps. If a user has multiple roles, then they will have to complete the combined steps from all of the roles. In this circumstance, you cannot choose the exact order in which the steps need to be performed.

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Profile Completion Steps + Add Profile Step

Getting Started Steps Sort Profile Steps

Choose role

Member ▾

Title	Weight (%)	Edit	Delete
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Add profile photo	25%		
Set your preferences	25%		
Complete your profile	25%		
Join a space	25%		

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Add Profile Step

1. Click the gear icon > **Manage People** > **Getting Started Steps**.
2. Click **Add Profile Step**.
3. Select the **Role name**.
4. Select the **Action type**:

Action type	Description
Add profile picture	Suggests that members upload a profile photo.
Complete profile	Suggests that members complete their profile.
Create a space	Suggests members to create a new space. Note that these members must have permission to create spaces.
Invite people	Suggest that members invite people to your intranet.
Join a space	Suggests that members join a space.
Set your preferences	Suggests that members update their preferences in their profile.
Update password	Suggests that members change their password.
Upload a file	Suggests that members upload a file to a folder that you choose with the settings.

5. Enter a **Title** for the step. The title will appear in the Getting Started widget.
6. Enter a **Description** for the step.
7. Give the step a **Weight**. As users complete the steps, their Getting Started percentage will increase. Not all steps need to have an equal weight, however we suggest that the sum of all the steps equals 100.
8. Check **Optional** to make the step optional.
9. Click **Save**.

Edit Profile Step

1. Click the gear icon > **Manage People** > **Getting Started Steps**.
2. In the **Choose role** menu, select a role.

3. For the step, click the edit icon.
4. Make changes to the step.
5. Click **Save**.

Delete Profile Steps

1. Click the gear icon > **Manage People** > **Getting Started Steps**.
2. In the **Choose role** menu, select a role.
3. For the step, click the delete icon.
4. Click **OK**.

Sort Profile Steps

1. Click the gear icon > **Manage People** > **Getting Started Steps** > **Sort Profile Steps**.
2. In the dropdown menu, select a role.
3. Drag and drop steps to change their order. Changes are saved immediately.

Related

[New User Engagement Email](#)

The new user engagement email is sent to new users who haven't engaged on your intranet after a certain number of days. The new user engagement email helps you automate engagement reminders to your new users.

[Inactive User Email](#)

The inactive user email is sent to users who haven't engaged on your intranet after a certain number of weeks. The inactive user email automates engagement reminders to your intranet users.

tags : site-administrator