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The Essentials Series:
Delivering Pervasive User Profiles

What Is Personalization and Why Should You Care?

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by Greg Shields

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What Is Personalization and Why Should You Care?

When you think about the computer on which you're reading this article, what about that computer makes it uniquely yours? It is likely the hardware that was assigned to you by your business or organization. It might have some form of inventory tag stuck on it. In a database somewhere, your computer's ID is probably linked to your employee number, which means that losing or breaking it means the start of one really bad day.

But as you use your computer over time, it very quickly becomes more than just a tagged piece of office equipment like a filing cabinet or the office kitchen's toaster. Among all office equipment, computers are in fact unique for just this reason. Over time, our regular and daily interface with this seemingly infinitely-configurable piece of hardware almost seems to humanize it:

- You might change the background color from your corporate standard to a picture of your wife and kids or your recent vacation.
- Your Internet research may navigate you to Web sites of personal interest that you later store in your bookmark list.
- You might even change icons or color schemes or create persistent connections to nearby printers simply because you like the way these items improve your life on the job.

Each of these elements sum to add the "personal" into your personal computer. Your IT technicians may initially send out new computers with their standard configuration. Yet your computer's personality over time diverges in many and sometimes subtle ways from every other one in your office. All these individual customizations are what the IT industry calls the "personalization" of your computer. And, after years of ignoring these elements when working with its customers, smart IT organizations have now come to realize how important they are to overall employee satisfaction.

Sins of the Past

In unenlightened IT organizations, many see personalization elements as “those annoying user-specific bits” that are above and beyond their responsibility. Desktops and laptops are considered by some to be hardware that is completely interchangeable. If your personal desktop or laptop hardware experiences a problem, the end result is to simply swap out that hardware for an alternate. “The computer is the property of the company,” is a statement often heard in these organizations, with any personalization elements often discarded in the hardware swap.

Yet in a world of ever-increasing office time dedicated to computer time, the idea of simply disregarding these unique and personal configurations is an affront to users. Throwing away a user’s laptop personality has become akin to throwing away the pictures of friends and family on the walls of their office. Yesterday’s de-prioritization of user personality elements can no longer be today’s standard procedure if you value your customer’s workplace satisfaction.

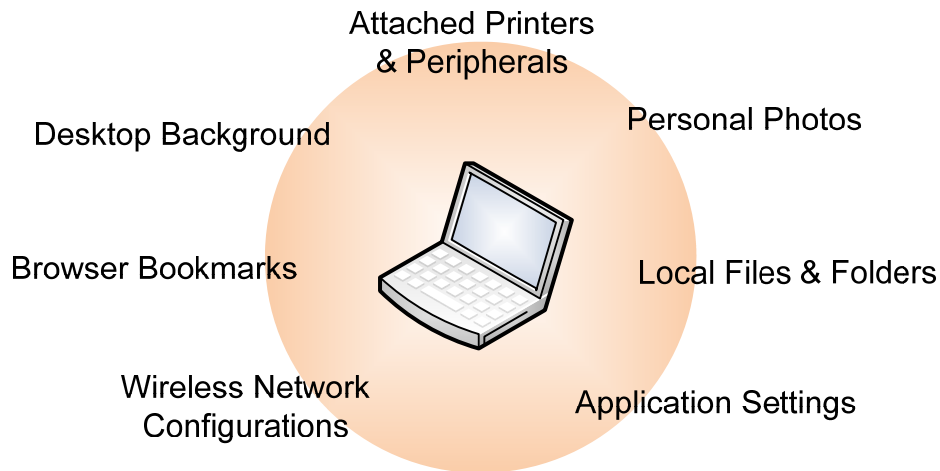


Figure 1: Numerous user-specific configurations merge to create a computer’s personality.

Defining the Workspace

Yet another issue may be a misunderstanding by IT about what really constitutes the user's workspace. It is easy to see how someone's desktop background showing pictures of their kids is a definite personal element, but what truly makes up the online workspace of today's knowledge workers? Today's concept of the user workspace is comprised of the personalized and reliable access to the applications, information and data, printers and peripherals, and individual settings that are relevant for the context of each user.

In short, "the workspace" is the place in which a user is able to do their job.

That workspace is made up of a very large number of elements, including browser settings, desktop settings, application settings, printer settings, personal data, environment variables, personal email profiles, and essentially any individually customizable element that enables them to accomplish their assigned job in a comfortable setting. With this in mind, however, it is important to recognize that the idea of this workspace goes ever further than just these settings alone. To be fully recognized, the user's workspace is also tied to each of the computing interfaces used by users in the course of their workday. These include the user's location, the time of day, any devices used by the user, as well as any of the multiple ways in which users interact with the IT and network infrastructure that is your business' computing environment.

Consider the typical computing environment that is common to businesses both large and small. Users in these environments often have one computer on which they perform most of their daily processing. On that computer will be installed one or more applications that have been defined and assigned by the IT organization. On that computer will be a set of personalization elements that make this device familiar and comfortable to the user. Yet in the course of their workday, that same user might log on elsewhere. They may connect to remote applications through an infrastructure such as Microsoft's Terminal Services or Citrix's XenApp for additional applications. There may be other computers they irregularly use in conference rooms to host presentations or collaboratively work on projects together. Your organization may have kiosk computers in various locations such as break rooms, cafeterias, or shared work locations where users may also need to work depending on the requirements of their job and the needs of their teams.

Each of these locations represents another area where user personality elements can and are configured and stored by that user. Yet there is a central problem in environments that rely on native OS tools alone for the hosting and distribution of these elements. Namely, that the Microsoft Windows operating system (OS)—along with its concepts of user profiles and "roaming" user profiles—has not traditionally done an acceptable job in managing these profiles and disseminating them to their needed locations.

Roaming user profiles in the native OS suffer from a number of limitations:

- Users who log into multiple systems simultaneously often experience unexpected behaviors as profile information transfers from a central storage location to individual device and back.
- Logging out of individual devices sometimes does not correctly update profile information in the centralized store, losing critical user information in the process.
- Roaming user profiles retain device-specific settings that can cause unexpected behaviors in other devices, over time creating large quantities of useless configurations that confuse users and reduce their overall satisfaction.
- Profiles from one OS version are often not compatible with other OS versions, requiring the creation of multiple profiles per OS instance or complicated hacks that reduce performance and increase complexity.
- Once implemented, no rich management interface exists to centrally control the security and administration of these profiles.

Because of these complexities, many organizations are ultimately resigned to using device-specific user profiles. Yet as noted earlier, these device-specific profiles come at some cost to the organization; namely, that users are forced to continuously re-create a comfortable workspace each and every time they interact with a new system or interface. Further, because device-specific profiles are literally stored on individual devices, the loss or replacement of devices usually results in yet another workspace loss. In the end, your business suffers when you don't pay attention to this repeated loss of personalization.

To that end, your IT organization should consider the use of external solutions that enable the realization of pervasive personality for your users. Solutions such as these go above and beyond the limitations of native Windows user profiles and central administration tools such as Group Policy. They enable users to experience a common and familiar workspace irrespective of the way they connect to your business IT environment. They enable administrators to automatically provide the right applications, the right printers, and the right data to users based on who the user is as well as where, when, and how the user is connecting.

The second article in this series will frame just what that environment of pervasive personality can look like. It will discuss further how users connect into your business environment and talk about how pervasive personalization technologies can benefit the users' workflow and ultimately your business' bottom line. Obviously, to get there, some mechanism for distributing these personality elements must be leveraged. The third article will discuss how mechanisms such as external databases that enjoy rich administrative control can effectively deliver this pervasive personality to the users and devices in your environment today.