



Selecting Web-use Management Software – the Right Way

How HR and IT Work Together at Wescast Industries

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Even though technology is involved, Wescast management recognized early that employee Web-use management is really all about people.

Rebecca works in HR. Mick works in IT. Worlds apart, right? Wrong! Not in this case. At Wescast Industries – where they work – HR and IT experts often work together to address workforce management issues. In this particular case, Rebecca and Mick, with help from several line managers, collaborated to improve significantly the way in which Wescast addresses personal surfing in the workplace. Such surfing is fast becoming a crucial issue for management, one that can easily degrade productivity and unnecessarily increase labor, legal and bandwidth costs.

What makes this particular case so interesting is the *way* in which Rebecca and Mick went about their task. They used a well-organized, logical, reasonable, balanced, and systematic approach – with contributions from all responsible parties. Their effort is a classic example of how interdisciplinary teams *should* work. Something we don't always see.

Unlike Wescast, many firms deal with casual surfing (a.k.a. “employee Web-use management”) by simply dumping the problem on IT, often with much less than satisfactory results. That's usually because management mistakenly views the issue as a pure “IT-security” or “access control” problem. When they do, they miss the point that *the real crux of the issue is actually human behavior*, i.e., the way in which workers use their PC browsers to view and use Web pages. Such use can be productive, nonproductive, wasteful, or even dangerous. Therefore it's a *people* management issue, and its resolution requires a combination of HR's organizational behavior expertise, IT's technological capabilities and management's supervisory skills.

That's the approach that Rebecca, Mick and their colleagues used.

About Wescast Industries

Based in Canada, Wescast Industries Inc. is the world's largest supplier of cast exhaust manifolds for passenger cars and light trucks. The firm designs, develops, manufactures and machines high-quality iron and steel exhaust manifolds for automotive OEMs (Original Equipment Manufacturers.) In addition to auto parts, Wescast produces pressure retaining high-alloy cast steel pump components for the petrochemical, pulp and paper and food processing industries.

With approximately 2,200 employees (1,900 with Internet access), the Company operates seven production facilities in North America and three sales and design offices in North America and Europe. The company is recognized worldwide for its quality products, innovative design solutions and highly committed workforce.

Working closely with customers through all phases of production - from design and development through prototype introduction to thin-wall casting and machining of manifolds - Wescast employees have established a strong reputation for efficient, high-quality, technologically advanced operations.

Wescast indicates that it ... “has a philosophy of empowerment, communication and competency that makes people the organization's greatest asset: That

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philosophy is dependent upon the principles of shared knowledge, shared experience, shared objectives and shared technology. Almost everyone at Wescast has access to the Internet and the company's own intranet. They have the ability to browse customer, supplier and competitors' Web sites. Communication has never been easier.”

The Challenge

What makes this particular case so interesting is the way in which Rebecca and Mick went about their task. Their effort is a textbook example of how IT and HR can work together.

Without a doubt, the philosophy and technology cited above benefit Wescast and its employees in numerous ways, e.g., productivity, efficiency, customer relations, and partner relations. On the other hand, potentially at least, these benefits come with a downside. The Internet is so open, interesting and easy to use that workers are often tempted to spend time surfing, downloading and emailing for personal rather than business reasons. Numerous studies indicate that 30-40 percent of online time in the workplace is spent this way. In addition to causing lost productivity and unnecessary bandwidth costs, such activity can result in importation of dangerous computer viruses and create the risk of costly and embarrassing legal liability situations due to display of offensive – often pornographic – images.

For several years now Wescast has had an “Acceptable Use Policy” (AUP) prescribing the “do’s and don’ts” of Internet usage. New employees must read and sign off on the policy before a LAN account which is required to access the Internet is created. Nevertheless, like most firms with extensive network resources, Wescast management knows that they need to monitor and manage such usage to ensure that it conforms to the policy and is as productive as possible. They also need to ensure that such usage does not jeopardize the network’s integrity or performance in any way and does not create any legal liability problems.

As one example of their concerns, Mick mentioned “Wescast Industries does not allow the use of any external email systems, including Web email such as Hotmail or Yahoo.” In this particular regard, Wescast needs to identify new sources easily and block them to prevent viruses from bypassing their normal email filtering systems.

On the other hand, Mick also mentioned that Wescast operates on a trust basis (as alluded to in the philosophy cited earlier), and its AUP is “fairly liberal,” i.e., it permits a reasonable amount of personal surfing. However, it clearly defines abuse of Internet privileges and points out that such abuse will not be tolerated. In particular, the policy outlines restrictions covering Internet email, pornographic material and excessive personal usage.

With these considerations in mind, Wescast management set out some time ago to establish a monitoring and reporting system that would aid in the employee Web-use management challenge.

Wescast’s Overall Approach to the Solution

Even though technology is involved, Wescast management recognized early on that the employee Web-use management challenge is really all about people, and they saw it mostly as an organizational behavior issue, not an IT-security matter. So they assigned Rebecca – an HR Generalist – to lead a team effort to develop

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an overall optimal solution, with primary technical support coming from IT, and with general management input coming from several functional managers. In the Wecast setting, assigning HR to coordinate this task was quite natural. That's because HR is closely involved with – and provides guidance to – workforce leaders in matters pertaining to employee behavior or policy violations. To do this effectively, HR needs accurate information depicting the workforce's Internet usage activity. Thus the need for IT participation.

Management and the team agreed that HR would have the final say on the purchase. After all, Wecast reasoned, what good is a system that integrates well with its current technology if the information it provides is useless?

As mentioned, Wecast already had an AUP to use as basic guidance. They also already had in place a general process under which HR and management collaborated to deal with individual employee behavior issues once they were identified. Knowing this, Rebecca, Mick and their colleagues concentrated on developing an efficient method of acquiring, processing and distributing accurate employee Web usage information – information that would make their problem detection and correction efforts more efficient and more precise.

What kind of information? Basically, HR (and ultimately line management) needs at least two levels of employee Web-use information – which IT needs to provide or make available. The first is high level, “big picture” screening data to indicate to HR whether or not, in general, a problem exists at a particular location, e.g., too much unacceptable activity. Then, if a potential problem is discovered, detailed “drill-down” information at the individual employee level is needed, e.g., which sites did the employee visit, how many visits, type of content involved, etc., i.e., the information needed to deal with individual employee situations.

Here's how the Wecast team pursued this objective.

Establishment of Software Requirements

As a critical first step, Mick worked closely with Rebecca and others to first define the specific requirements that a solution would have to meet.

The team came up with four types of requirements: (1) General, (2) Functional, (3) Technical and (4) Vendor Support.

General Requirements. The software must ultimately enable HR personnel to take over the function of creating both scheduled and manual (ad hoc, drill-down) reports. After performing initial installation and training, this would relieve Mick and his Information Systems colleagues of all but the technical administration of the software. (Mick would assist with the initial creation of scheduled reports and train HR personnel on creation of user audits and report reading. He would also continue to be responsible for identifying and blocking unauthorized Web email sites.)

Management and the team agreed that Human Resources would have the final say on the purchase. After all, Wecast reasoned, what good is a system that integrates well with its current technology if the information it provides is useless? Consequently, before final purchase, HR would be required to approve the value of the reports and verify that their requirements were met.

Functional Requirements. As a minimum the software must:

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The software must ultimately enable HR personnel to take over the function of creating both scheduled and manual (ad hoc, drill-down) reports.

- > Quantify and sort Web-use activity into categories by content (shopping, news, pornography, sports, financial, Web email, hate and crime, etc.).
- > Let Wescast rate categories as to acceptability (conformance to policy).
- > Produce a variety of scheduled and unscheduled reports at the overall summary and user audit detail level.
- > Allow creation of individual location-specific reports that only cover users at that location.
- > Produce reports that can be easily read and interpreted by HR and other personnel who are not IT professionals.
- > Provide an indication of bandwidth consumption.

Technical Requirements. As a minimum the software must:

- > Integrate smoothly with existing systems.
- > Enable reports to be distributed by email.

Vendor Support Requirements. As a minimum the vendor must:

- > Provide competent and responsive technical and sales support.
- > Provide upgrades and updates at no additional charge.
- > Have good references
- > Understand Web-use management from a human behavior standpoint as well as from an information technology perspective.

The Search for Optimum Software: Initial Disappointments

The team having agreed on requirements, Mick commenced the search for the right solution. He started by attempting to provide the required information through use of existing resources such as MS Site Server Usage & Reporting Analysis tools. This, however, involved extensive manual work on his part, e.g., tediously pouring through cryptic logfiles, looking for obscure patterns that might indicate something objectionable, manually generating reports, etc.

This approach proved to be so unwieldy and inefficient that it soon became obvious that something else was needed. Mick and the others knew that certain software products on the market claimed to be able to do what Wescast needed. So they decided to “buy” rather than “make” a new system, and Rebecca championed the idea with upper management and got the go-ahead to proceed.

It took Mick two months of hard effort and considerable testing before he came upon Wavecrest Computing’s Cyfin Reporter product. Here’s what he had to say:

“I tested at least a dozen products before being introduced to Cyfin. I spent a lot of time working with other vendors’ Sales and Support staff trying to make their systems do what Wescast required. I can honestly say that all the vendors tried their best to assist me, but sometimes you can not make systems do something

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they were not meant to do. I wish I had known about the Cyfin product from the start. The description alone would have steered me towards it first and I could have saved a lot of time.”

I can honestly say there are a lot of great products available that claim they can provide Internet usage reports but this is usually a bolt-on feature to a more robust system that provides reports on Web, ftp, firewall traffic and so on. If you are really serious about monitoring Internet usage, you need a product that focuses on this area, Cyfin is that product!”

Now, let’s take a look at Mick’s evaluation of Cyfin.

Cyfin Evaluation

*“I wish I had known about the Cyfin product from the start. The description alone would have steered me towards it first and I could have saved a lot of time.”
—Mick, IT*

Cyfin seemed to hit the nail on the head. Rebecca and several plant leaders (line managers) reviewed a number of sample reports and agreed that they met their needs and were easy to read. Again, here’s what Mick had to say:

“Cyfin was the only product that matched all the requirements I was looking for. HR had set a guideline for what they wanted, and I had my own requirements since I am the one currently running reports with another product. The system needed to be easy to use, work with Active Directory (A.D.), separate users based on facility (location), allow reports to be scheduled and allow HR to take on a more visible role in the reporting and analysis of Internet usage.

I had some minor difficulties with importing users in groups from the Active Directory (A.D.), but Wavecrest Support was quick to supply a fix and answer my questions regarding reporting features. I took the approach that I could read the manual but I wanted answers fast. Wavecrest Support and Sales were very helpful in answering all my questions.

The ability to separate users by facility or Organizational Unit was the “big hitter” overall. No other product I tested was able to do this without a tremendous amount of manual data manipulation. With Cyfin, I simply wrote a script to “walk” the Active Directory (A.D.) and fed the results into the system. I understand Cyfin will actually work with A.D. right out of the box now, so it is even better than when I evaluated the product.”

What’s Next?

Now that Cyfin is installed and integrated, Rebecca and Mick will begin the implementation phase. First, they will work together to:

- > Rate all categories for acceptability (in consonance with Wescast’s Acceptable Use Policy).
- > Create a set of scheduled reports that will meet HR’s routine, repetitive need for high level monitoring and tracking information.
- > Train HR representatives at all seven of their locations on the overall Web-use management process, including how to request, interpret and use reports.

Once Cyfin is fully implemented, Rebecca, Mick and their other HR and management colleagues will continue to work together to ensure success of the

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overall effort. Mick will continue to administer the system from an IT perspective and manage Web email issues. Rebecca and her HR counterparts at the other locations will regularly review scheduled reports to identify general problem areas and request specific user audit reports when appropriate. Mick will create the user audits and furnish them to HR for their use in conjunction with the employees' supervisors.

A well-designed employee Web-use management solution can maximize workforce productivity while preserving good morale. Achieving such a design is not easy, though.

Looking ahead a bit further, Wecast may take advantage of a soon-to-be-released new Cyfin feature that should make the overall employee Web-use management effort even more efficient. Wavecrest Computing will soon incorporate a Web-enabled "Manager Console" feature into Cyfin to enable HR and other "non-IT" personnel to create and retrieve reports from their PC browsers without assistance from IT.

Also in the future is the potential use of Cyfin for positive, productivity-enhancement purposes that go beyond simply identifying and correcting "problems." As companies become more and more dependent on their employees' use of the Internet, intranet and extranets, it behooves managers more and more to monitor and then optimize – through positive-oriented training and counseling – the way in which this is done. One way to do this is to use Cyfin's custom category capability to track visits to sites of specific "local" interest. Such sites might include customer sites, internal and external training sites, intranet informational sites, and extranet partner sites – sites that are not included in monitoring software products' standard categorization databases.

Summary

A well-designed employee Web-use management solution can maximize workforce productivity while preserving good morale. Achieving such a design is not easy though. It's a challenging multidisciplinary effort involving management know-how, human resources knowledge, IT skills and software procurement expertise. Several major steps are involved.

Management and HR must carefully craft a rational AUP and related enforcement processes. They must then "translate" these items into specific requirements for supporting software. Then IT must explore and test available options for providing software that meets or exceeds all requirements. Finally, responsible managers and all employees must be briefed on the policy and related control processes. And all these efforts must be closely coordinated to ensure success. It's not easy, but it can be done. Wecast did it – admirably.

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