

CONTACT CHRONICLE

Demonstrable Corporate Governance Compliance

Key Benefits

- Search for key items of correspondence, such as promises made to customers
- Retrieve chronology of significant discussions as either flat or threaded view
- View history of interaction with customers despite any staff turnover
- Provide single repository for all phone, meeting and email records
- Provides a corporate LDAP customer address book
- Ensure compliance with IT Governance regulations
- ISPs, serviced office providers or incubators can provide isolated services to multiple companies
- Easy to customise the appearance to your corporate standard
- Works with popular mail servers and clients
- All functions available via popular Web browsers

Is email the weak link in your Corporate Governance?

Email issues in Corporate Governance are increasing and becoming more urgent. It is more important than ever to keep complete archives and be able to locate specific important items of business email. It has become the pervasive business communications medium and is now an accepted mechanism for critical and binding business communications.

Email messages are legally binding in many countries. In this era when great importance is placed on Corporate Governance, it is essential that companies can show that email communications are appropriately tracked and filed. In an environment where contract or requirement clarifications or changes may well be based on email, companies can no longer trust the management of these communications to be left to individuals. Filing by hand is simply not an option. Loss or even delayed access to consolidated email communications may leave companies exposed to substantial contractual risk or project failure due to divergent understandings between companies and their customers.

Even if your clients are internal as in the case of a legal department providing advice to your business units, the personal or business ramifications of a failure to manage communications records are no longer acceptable.

Enterprise tracking with Contact Chronicle

Contact Chronicle is an automated background service for capturing and filing business email. It comes as a self-contained appliance that is installed with a minimum of fuss and builds up a database of all email to and from selected (tracked) correspondents.

Authorised users can browse the database to locate required emails. It also supports logging communications for other media such as meetings and telephone calls.

Contact Chronicle was initially built by Forge to enable successful delivery of long-term projects to major clients. Client re-organisations and staff turnover make it essential to have a reliable mechanism for discovery of history to ensure a consistent understanding between parties and if necessary to find the evidence that will enable effective non-repudiation.

While it helps you fulfill your IT Governance obligations, Contact Chronicle also provides an invaluable business asset. Threaded views of conversations and advanced search of participants or content help you to find communications quickly and then see them within the context of the bigger picture.

Phone calls and meeting notes can be linked to each other or to an email trail and viewed as a combined chronological discussion. You can see email and phone logs for a particular client in a threaded view with responses as either email or phone logs. The complete discussion can be captured.



Contact Chronicle

Contact Chronicle keeps a structured historical record of email and phone logs to and from selected individuals and companies. It also provides a means of entering notes for meetings to supplement the mail or phone items.

How it works

To file mail, Contact Chronicle intercepts an organisation's raw external mail traffic. It selects mail on the basis of a corporate address book of individuals and domains of interest. Any message that is to or from a tracked person or company is automatically filed under a mailbox for the sender or receiver. If instructed to track an entire company, then individual mail boxes for company representatives are automatically created as they are discovered. Personal contacts at a tracked company can be marked for exclusion if required. This feature is used where perhaps a spouse works at a company you do business with and you don't want personal emails with them tracked.

Phone call and meeting logs can be attached to each other or to emails to create a chronological discussion that is conducted over multiple media types. For example a phone call could trigger a series of emails and phone calls all related to the same issue. The entire conversation can be viewed as a single thread in Contact Chronicle.

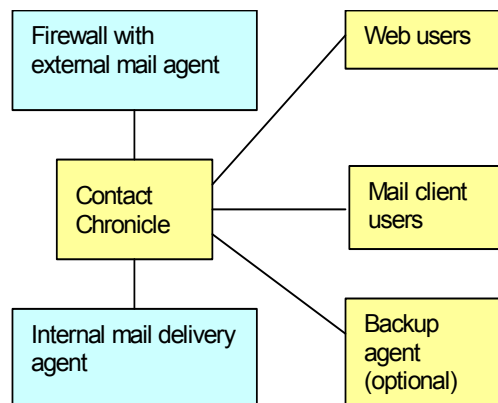
Authorised users are able to browse the discussions on line. Advanced search capabilities allow specific communications to be found quickly either by sender, recipient, subject or message body search. Multiple search criteria can be used in concert to narrow the results. The user can switch from the search results to view the entire thread containing the result. If required, the particular message or the entire thread can then be forwarded to a third person. This provides a powerful and immediate mechanism for substantiating your point of view when dealing with client issues. Often the immediacy with which an entire discussion can be sent to a client can cause issues to dissolve before becoming problematic.

A network appliance

The system can be packaged as an "appliance", that is, as a separate machine pre-loaded with software. This provides ease of installation and clear demarcation of responsibilities.

The system connects between an organisation's main mail server (on one machine) and the external mail agent (on the firewall machine). This replaces a direct connection between the two, as shown in the diagram.

The Contact Chronicle appliance is designed to be part of any mail system installation, with minimum impact on system administration.



Email client integration

While all of the functionality provided by Contact Chronicle is available via a web browser interface, integration with mail clients provides an environment where you can act directly from your inbox. You can

- Add new users or domains that require tracking
- Edit the contact details for an individual
- View an individual's mail box
- Create a phone or meeting log associated with an email in your in-box

Flexible licensing scheme

Contact Chronicle can either be purchased on a per company basis or used on a subscription basis. Please contact Forge for pricing details.



Convenience Benefits

- Access Contact Chronicle from standard web browsers
- Access Contact Chronicle functions from supported mail clients
- Perform multiple criteria searches on body or participants
- Forward single communications or entire threads to third parties
- Use automatic address completion from LDAP-enabled mail clients
- Look up customer details from LDAP-enabled clients or web browsers
- Synchronise corporate address book with LDAP-enabled PDA and clients

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