



This document is made to be use by your IT department and Boréalisis.

BORÉALIS INTEGRATES OUTLOOK

Boréalisis users greatly appreciate our Mail Handler feature through BCC. But classification can sometimes be tedious. So our team developed a handy Outlook Add-in. Now you can send your emails and classify them in a few clicks without leaving Outlook!

The following checklist is intended for both the IT team that may be involved in installing the Add-in and for the superuser or manager who will introduce this new feature to other users.

The screenshot shows the Boréalisis Outlook Add-in interface. At the top left is the 'borealis' logo. The main heading is 'Create communication'. Below this are several dropdown menus for classification: 'Projects (required)' (set to 'Default'), 'Engagement plans', 'Issues', 'Grievances', 'Subject categories', and 'General atmosphere'. At the bottom of the form is a prominent blue 'Create communication' button and a 'Logout' link.

Benefits of the Outlook Add-in

The Outlook Add-in can completely replace or complement the traditional use of the Boréalisis email manager via BCCs. In compose mode, you can choose your categories directly in Outlook and your communication will be saved in Boréalisis. The add-in can also be used for emails received or processed afterwards and supports batch processing. As the category choices are made by a drop-down menu, the Add-in:

- Limits the risk of errors.
- Acts as a reminder to save the communication in Boréalisis.
- Allows you to save batch communications more accurately.

Fields

Like the traditional Boréalisis Mail Handler, the Outlook add-in allows you to categorize communications in the following fields:

- Limits the risk of errors.
- Engagement plans
- Subject categories
- Associated issues
- Linked grievances
- Linked communications
- Projects
- General atmosphere

Is the Outlook Add-in Secure?

BoréalIS integrates industry standard security practices into its software and extends them to data storage in a hardened and secure hosting infrastructure. Security is integrated into the architecture, policies and procedures of BoréalIS software. This also applies to our new Outlook Add-in.

- Authentication – The user must be logged in. SAML authentication is supported. Authentication is stored as a JWT token in the Microsoft account, allowing for shared authentication across devices and Outlook versions (Web vs. Desktop).
- ACL – The user must have access to create communications to do so using the Add-in.
- Row level security – Users only have access to view the same records as in the web application.
- All requests to the BoréalIS server are done using https protocols, same as the web application.

To know more about our security standards: <https://www.boreal-is.com/security/>

Installation

The Outlook Add-in can be installed in 2 ways.

Method 1: Installation by the IT department

Step 1: Download the XML file for the Outlook Add-in, available at the bottom of your BoréalIS instance homepage.

Step 2: Follow the procedure for Add-in deployment as specified in this link: <https://docs.microsoft.com/en-us/office365/admin/manage/manage-deployment-of-Add-ins?view=o365-worldwide>



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Method 2: Installation by the user

This method requires the user to have access rights to manage the Add-in in Microsoft Outlook.

Consult our Helpdesk section for a step-by-step description of the installation.

<https://helpdesk.boreal-is.com/hc/articles/360035106672>

To start using the Outlook Add-in, read our documentation on the Helpdesk site:

- Composing an email and sending it to Boréal: <https://helpdesk.boreal-is.com/hc/articles/360035478851>
- Sending an email to Boréal: <https://helpdesk.boreal-is.com/hc/articles/360035479151>

Compatibility

- Outlook 2013 or later on Windows
- Outlook 2016 or later on Mac
- Outlook on iOS
- Outlook on Android
- Outlook on the web for Exchange 2016 or later and Office 365
- Outlook on the web for Exchange 2013
- Outlook.com

