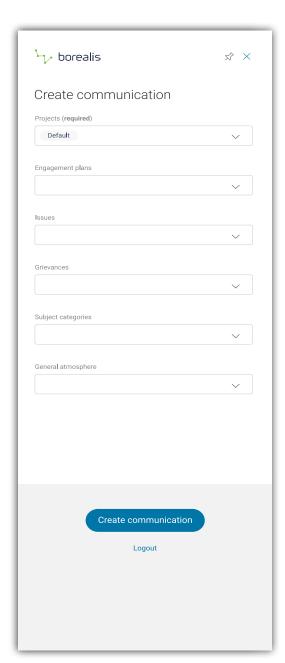# BOREALIS INTEGRATES **OUTLOOK**

Borealis 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 and classify your emails and meetings in just a few clicks, without even 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.

Benefits of the Outlook Add-in

The Outlook Add-in can completely replace or complement the traditional use of the Borealis email manager via BCCs. In compose mode, you can choose your categories directly in Outlook and your communication will be saved in Borealis. 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 Borealis.

• Allows you to save batch communications more accurately.

• Record all participants in a meeting in one quick step.

Fields

Like the traditional Borealis Mail Handler, the Outlook Add-in allows you to categorize communications and meeting in the following fields:

• Engagement plans

• Subject categories

• Associated issues

• Linked grievances

• Linked communications

• Projects

• General atmosphere

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Is the Outlook Add-in Secure?

Borealis 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 Borealis 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 Borealis server are done using https protocols, same as the web application.
- Only open emails can be accessed by Borealis and only if the add-in is open. This is called the ReadWriteItem permission.

Installation

The Outlook add-in can be deployed by the IT team for all users at the same time at project startup, or installed only by those users who want to use it. In both cases, updates and bug fixes will be done automatically by Borealis without the user or the IT department needing to get involved.

Method 1: Installation by the IT department
Step 1: Download the XML file for the Outlook Add-in, available at the bottom of your Borealis instance homepage.

Step 2: Follow the **procedure for Add-in deployment** as specified.

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.

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Borealis

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Use

The Outlook add-in is a complementary tool that lets you quickly enter email communications in Borealis. Users can decide whether or not they want to activate and/or use it. A key advantage of the add-in is that it won't slow down Outlook – whether it's actively in use or just sitting in the background.

- **Composing an email and sending it to Borealis**.
- **Sending an email to Borealis**

Compatibility

The Outlook add-in requires a double compatibility

Compatibility with the following versions of Outlook :

- Outlook 2013 or later on Windows (32 bit and 64 bit versions)
- Outlook on the web
- Outlook 2016 or later on Mac
- Outlook on iOS
- Outlook on Android

Compatibility with the following version of Microsoft Exchange:

- Exchange Online
- Exchange on-premise 2016
- Exchange on-premise 2019

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