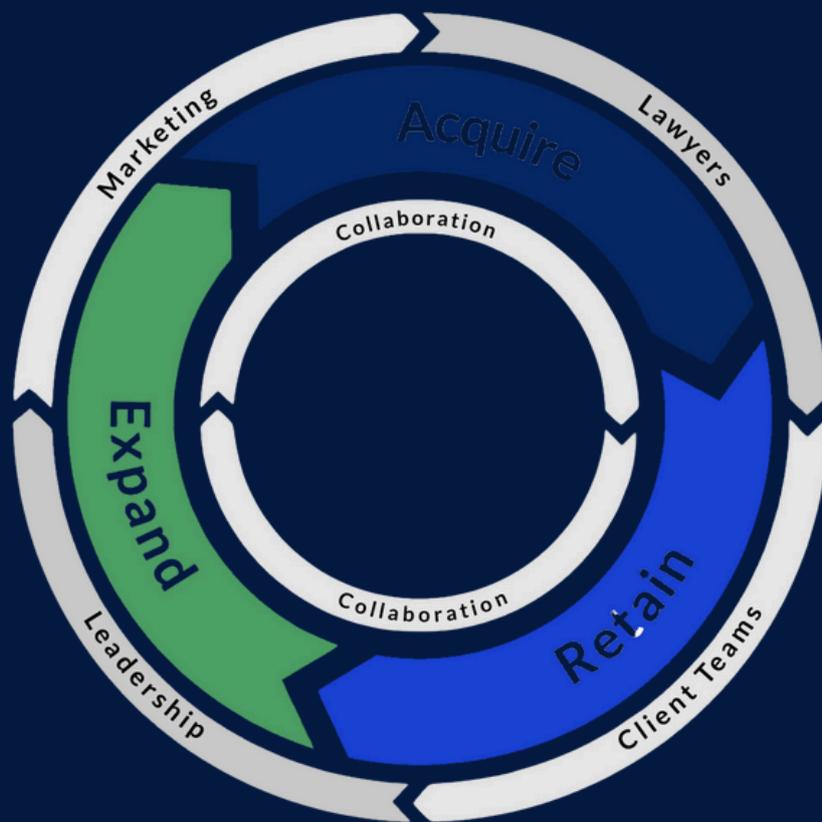


# Technical Documentation

Security. Integration, and Implementation  
Information for Office 365



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# Introduction

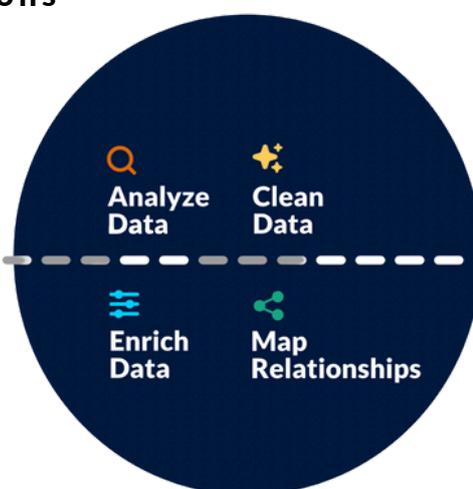
Nexl's products and services are transforming the way law firms grow, but the backbone of our success is providing a safe and trustworthy place for relationship and contact data. Protecting your and your clients' data is at the core of everything we do, from how we build our products to how we serve our clients. This security-centric approach is one of the many ways we've distinguished Nexl as truly purpose-built for law firms, allowing us to help thousands of lawyers around the globe to better manage their relationships.

## How Nexl Works

The core value Nexl provides is to deliver automated systems to track relationship information to save valuable time for you and your lawyers. We achieve this by integrating with your email system, which then informs Nexl of sent and received emails and calendar events. We then use advanced data enrichment to map your firm's relationships and add additional information about your contacts, such as job title, industry, location, and more.

But it's not just our automatic data-capture that sets Nexl apart—it's also the type of data we do (and don't) capture. Our systems only receive header information from your email servers—which means we only process the To, From, Cc, and timestamp. Nexl **does not** access or process the email's subject, body content, or attachments. This ensures no confidential, privileged, or sensitive matter-specific information is exposed.

### Capture Interactions



### Actionable Insights



# Data Enrichment

Using a stateless API, Nexl enriches your data through our own data systems, as well as third-party data providers. With solely an email address, Nexl is able to search for, find, and populate the following attributes:

## Companies

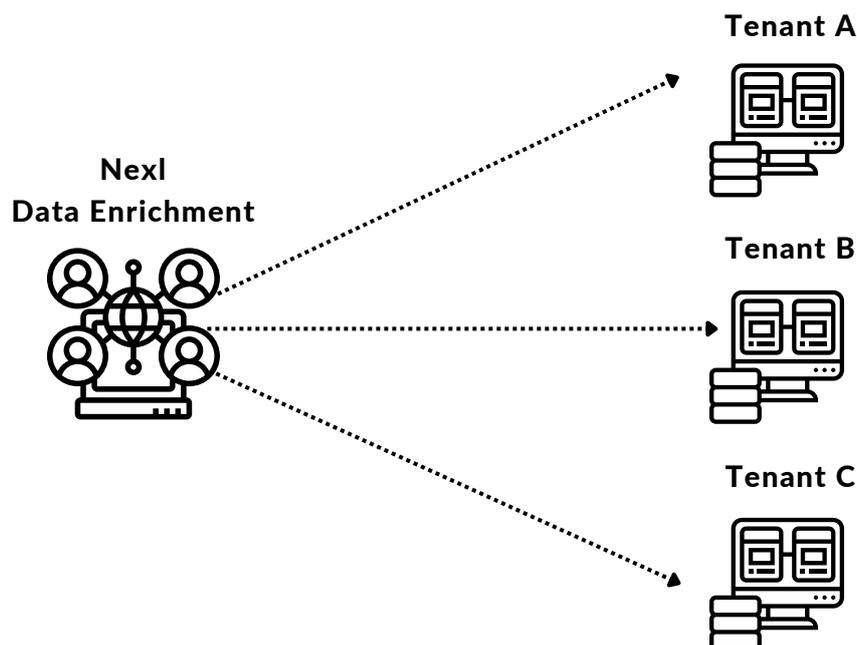
Name	Website
Description	Email
Logo	Phone Number
Employee Count	Address
Year Founded	LinkedIn URL
Industry	Twitter URL
Category	Other profiles
Keywords	

## Contacts

Name	Employer
Age	Job Title
Location	Website
Gender	LinkedIn URL
Education	LinkedIn Bio
Degree	Twitter Username
Photo	Twitter URL

Your contacts are fully owned by you. Nexl's data enrichment is a one-way flow in which you receive data from our data enrichment service, but the data enrichment service cannot access data from users (you).

At no point does Nexl use any of your contact information to enrich other organizations' contacts. Each Nexl tenant's data is stored separately, and we keep strict data guards to ensure no data is shared between tenants.



# Integration

Nexl integrates with Office 365 and Google Workspace (formerly G Suite), and can also be integrated in a Hybrid Exchange environment. The following sections will review how the **Outlook 365** integration works, as well as the respective steps for setup.

## How the Office 365 Integration Works

Nexl uses Office 365's Graph API, which provides a single endpoint to your Exchange service. When connecting Nexl, our Microsoft verified and registered Azure App requests permission to access your Office 365 mail service.

The scope of the permission allows Nexl's system to subscribe to change notifications to a user's mailbox and calendar, and allows the system to retrieve profile information from your Active Directory to identify your internal users. Please note, at all times, Nexl only requests read-only permissions to any of your services. Access to email is also limited to ReadBasicMail, which prevents Nexl from accessing anything beyond the header information.

You will always have full control over the connection between your Office 365 tenant and Nexl via your Office 365 admin portal. You can pause or terminate the connection at any time without needing to speak to anyone at Nexl.

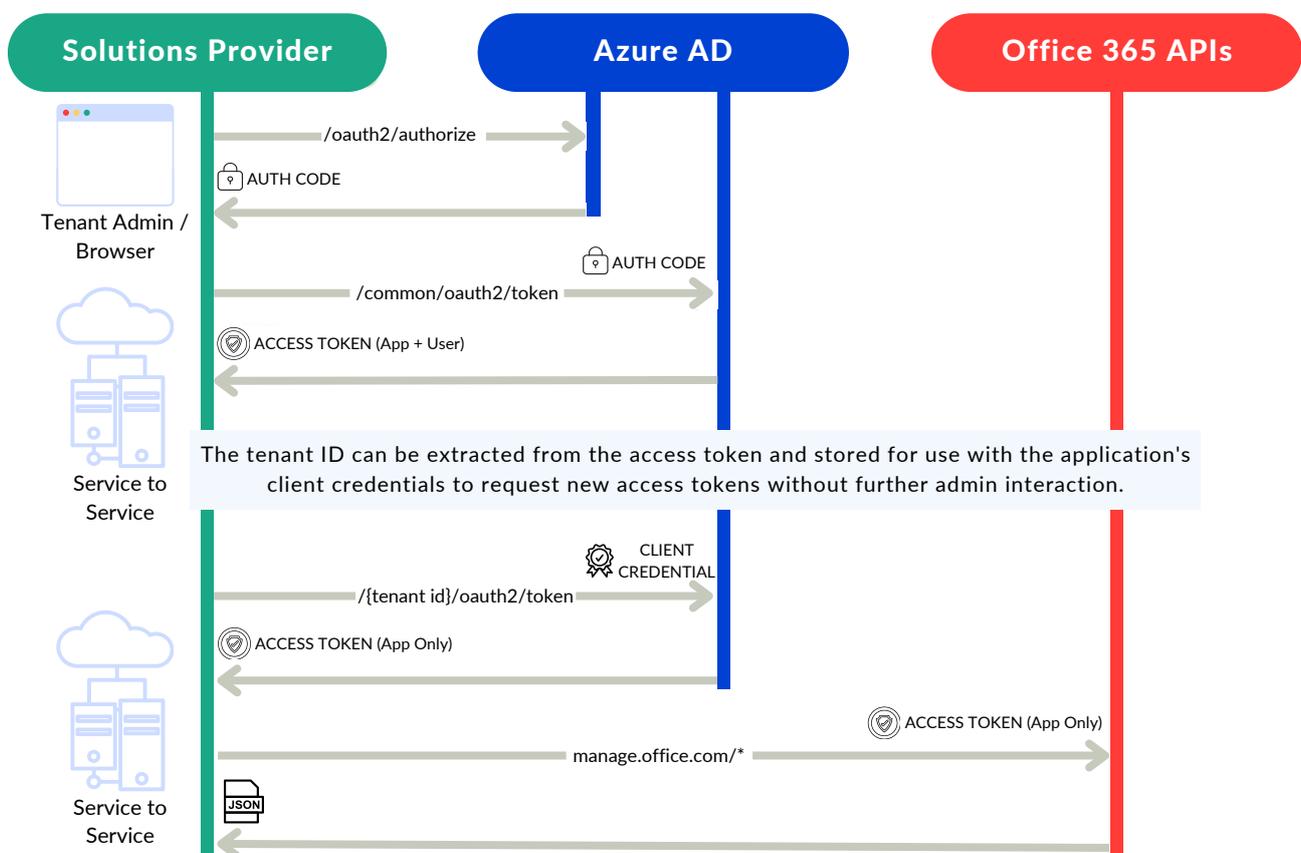
# Tenant Authentication

Since Nexl requires access to secured Office 365 services, an authentication process is required to show Office365 that Nexl has rights to access it. The Office 365 Management APIs use Azure AD to provide authentication services that Nexl uses to provide these access rights.

Your Office 365 tenant admin must explicitly grant consent to allow Nexl to access your tenant data by means of the Office 365 Management APIs. The consent process requires the tenant admin to sign in to the Azure AD consent UI and grant the access permissions Nexl is requesting.

Once set up, Nexl continues to request additional access tokens on an ongoing basis, without the need for further tenant admin interaction. The access tokens are then passed to the Office 365 Management APIs to authenticate and authorize Nexl.

The following diagram shows the sequence of consent and access token requests.



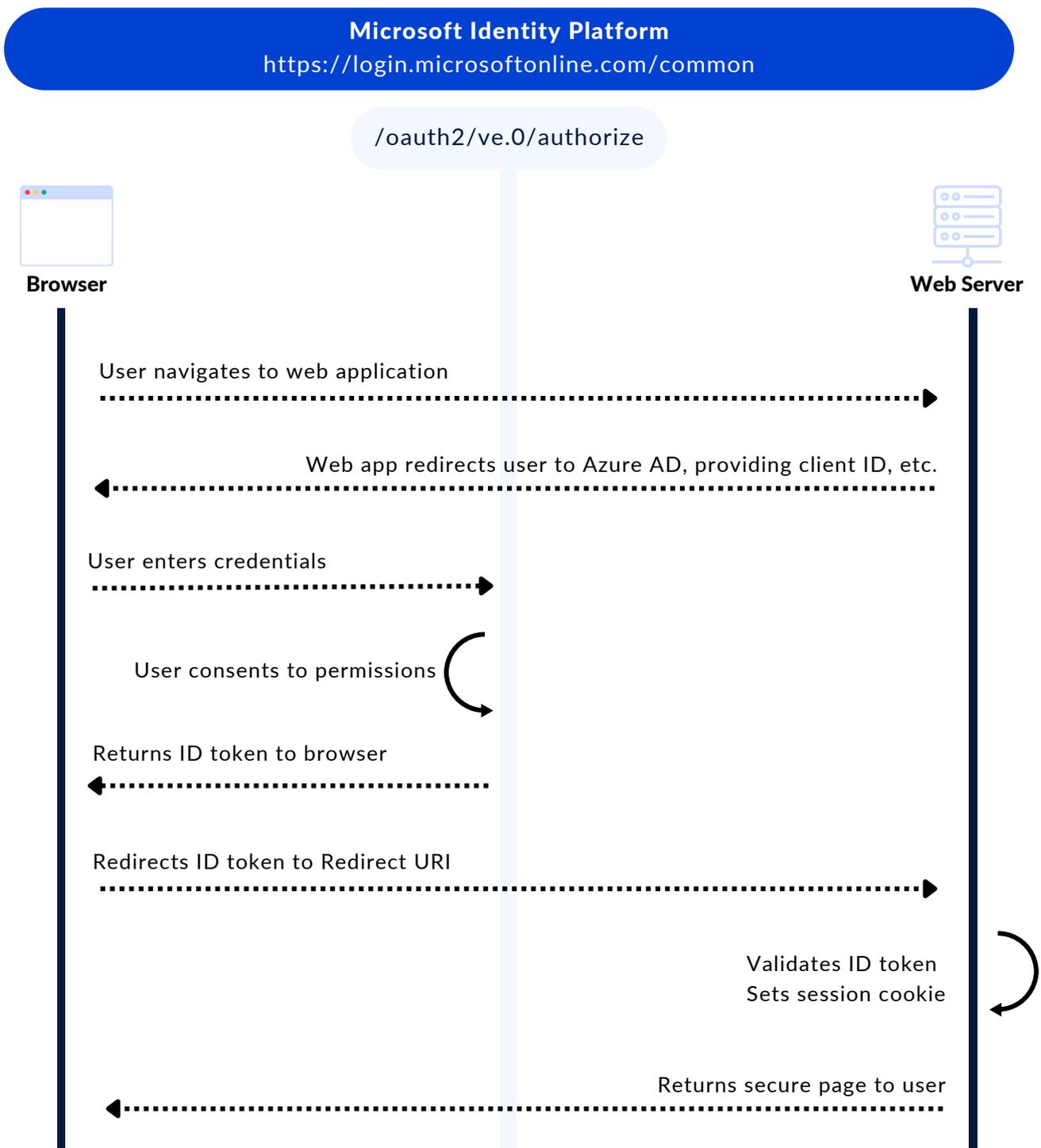
## Permissions

For Nexl to access data in the Microsoft Graph API, the user or administrator must grant it the correct permissions via the consent process. This table lists the permissions associated with Nexl's Office 365 integration.

Permission	Display String	Description	Type	Admin Consent Required
<i>Calendars.Read</i>	Read calendars in all mailboxes	Allows Nexl to read events of all calendars without a signed-in user. Required for real time syncing	Application	Yes
<i>email</i>	View users' email address	Allows Nexl to read your users' primary email address. Required for real time syncing	Delegated	No
<i>Mail.Read</i>	Read mail in all mailboxes	Allows Nexl to read mail in all mailboxes without a signed-in user. (Note: This scope is only used to create the "Change Notification" subscription. Nexl does not access not process email body or attachments.)	Application	Yes
<i>Mail.ReadBasic</i>	Read user basic mail	Allows Nexl to read email in the signed-in user's mailbox, <b>except</b> body, bodyPreview, uniqueBody, attachments, extensions, and any extended properties. Does not include permissions to search messages.	Delegated	No
<i>Mail.ReadBasic.All</i>	Read all users basic mail	Allows Nexl to read all users mailboxes except Body, BodyPreview, UniqueBody, Attachments, ExtendedProperties, and Extensions. Does not include permissions to search messages.	Application	Yes
<i>offline_access</i>	Access user's data anytime	Allows Nexl to read and update user data, even when they are not currently using the app.	Delegated	No
<i>openid</i>	Sign users in	Allows Nexl to receive a unique identifier for the user in the form of the sub claim. The permission also gives Nexl access to the UserInfo endpoint. The <i>openid</i> scope can be used at the Microsoft identity platform token endpoint to acquire ID tokens. Nexl can use these tokens for authentication.	Delegated	No
<i>profile</i>	View users' basic profile	Allows Nexl to see your users' basic profile (name, picture, user name).	Delegated	No

# User Authentication

When a user logs into Nexl, they get redirected to an Azure AD login page. The user then enters their username and password, and after a successful authentication, they will be redirected back to Nexl. The diagram below provides a high-level overview of the sign-in authentication flow.

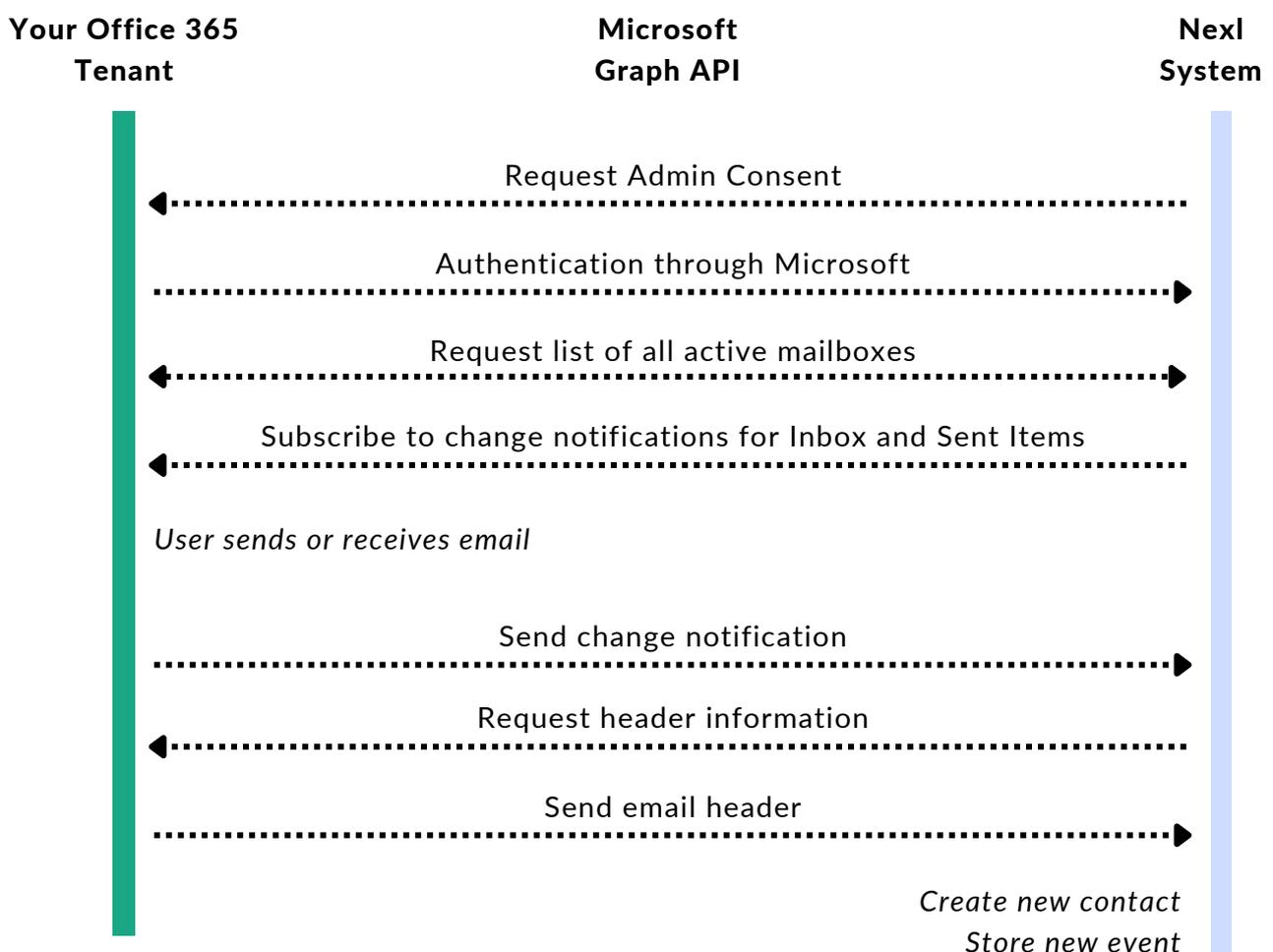


## Change Notifications

Once permission to your Office 365 tenant has been granted, Nexl retrieves a list of users and active mailboxes. You can then select the active mailboxes for which you want Nexl to subscribe to change notifications. (You also have the option to select all active mailboxes.) Nexl is only able to track relationship data from the selected mailboxes.

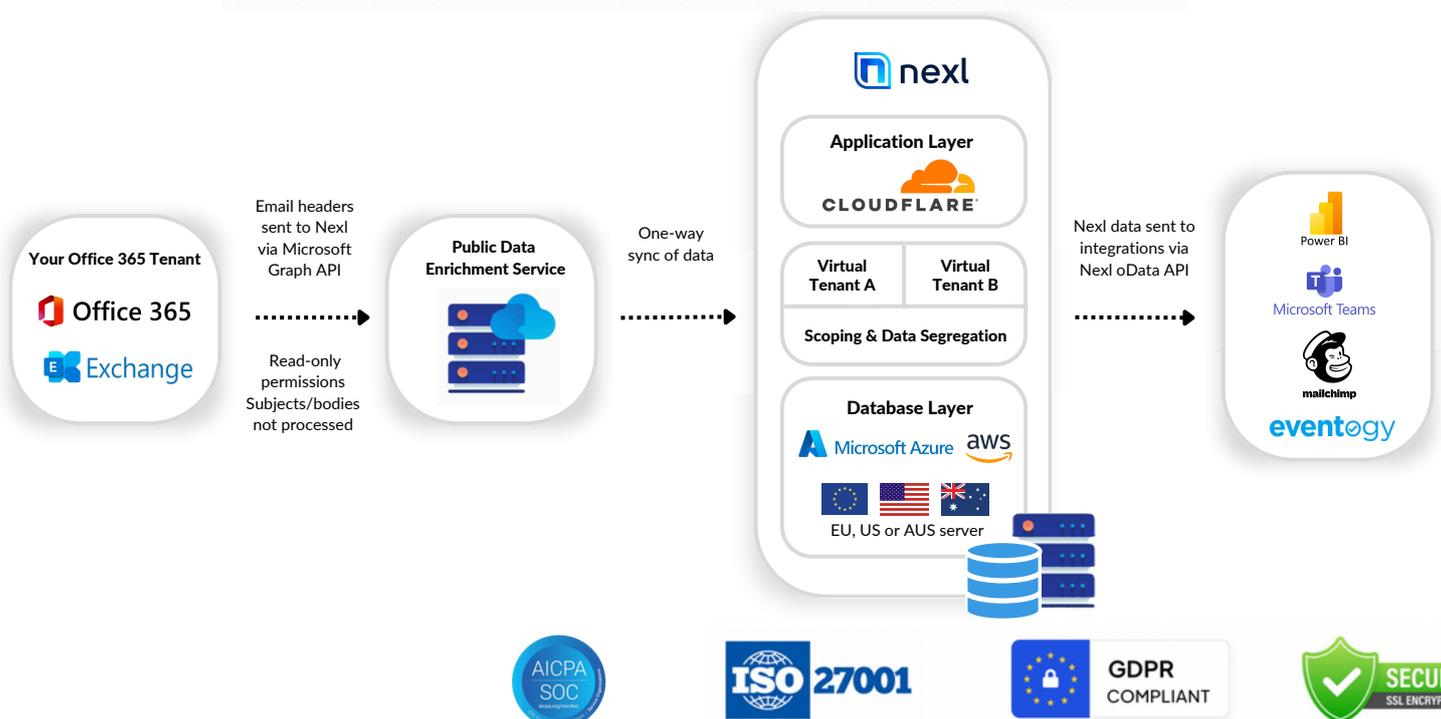
Once a mailbox has been selected, Nexl uses the Microsoft Graph API to subscribe to change notifications on the mailbox's Inbox and Sent Items folders. This allows Nexl to capture relationship information, as well as sent and received email items.

When there's a change to the subscribed mailbox folder (e.g., a new email is received), a notification is sent to Nexl's system which includes the email's unique identifier. Nexl then requests the email header with the matching ID and creates a new event. Each event includes the date, the To, From and Cc email addresses, and the email's public email ID, internal email ID, and conversation ID. The diagram below provides an overview of the change notification process.



# Information Security

By selecting our platform, you are choosing a cloud platform that is hosted on a fully audited and accredited cloud infrastructure to meet information security standards, including SOC 2 and ISO2700, which ensures the controls and processes are in place to protect your data. We have robust security measures including disaster recovery, data backup, and a fully redundant infrastructure to guarantee uptime.



# Information Security

For more details regarding Nexl's information security, as well as links to our Privacy Policy and Data Processing Agreement, please refer to the chart below.

Information Security	Details
Main Data Storage	AWS (EU, Australia), Azure (US), Digital Ocean (Canada)
Available Server Locations	EU, Australia, USA, Canada
Encryption	DB and File encryption enabled (transit and rest) All traffic through HTTPS only
Security	24/7 Security monitoring and threat detection through <a href="#">Cloudflare</a> and <a href="#">Rollbar</a>
Email Notification Delivery	<a href="#">SendGrid</a>
Data Backups	Daily backups are retained for 7 days. Weekly backups are retained for 4 weeks.
Data Accessibility	Data can be accessed 30 days after termination with possible extension up to 90 days. Alternatively, Nexl can provide an extract of customer data.
Planned Downtime	All customers will be informed at least 2 weeks before a planned downtime.
Privacy Policy	<a href="https://nexl.cloud/privacy-policy/">https://nexl.cloud/privacy-policy/</a>
Data Processing Agreement	<a href="https://nexl.cloud/data-processing-agreement/">https://nexl.cloud/data-processing-agreement/</a>



# Setup Guide

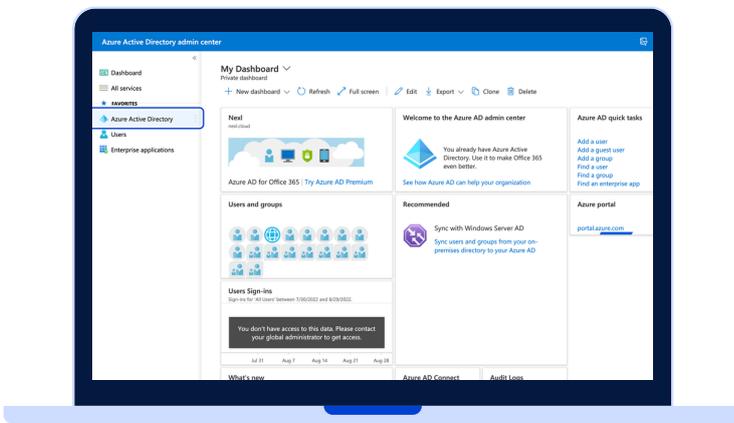
Nexl is a purely web-based system. Setting up Nexl is quick and easy, and we will be there to guide you along the way. Please see below for system requirements and a step-by-step guide to implementation.

## System Requirements

Before you begin your integration, please review the following system requirements and confirm that all requirements are met:

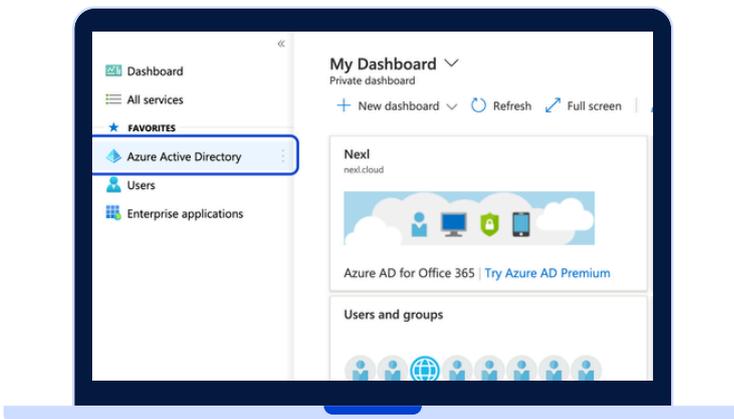
- Internet access
- Recent version of Google Chrome, Firefox, Safari, or Edge (You can access and use Nexl using IE11 but we do not officially support it)
- Office 2013 or newer (for Outlook Add-in only)
- Exchange On-Premise or Office 365 Exchange Online

## Implementation



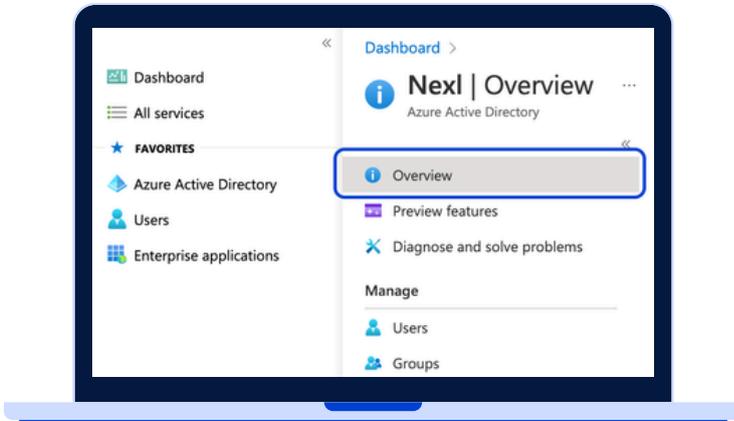
### Step 1: Locate your Office 365 Tenant ID

1. Navigate to <https://aad.portal.azure.com/>.
2. Log in using your Office 365 credentials.

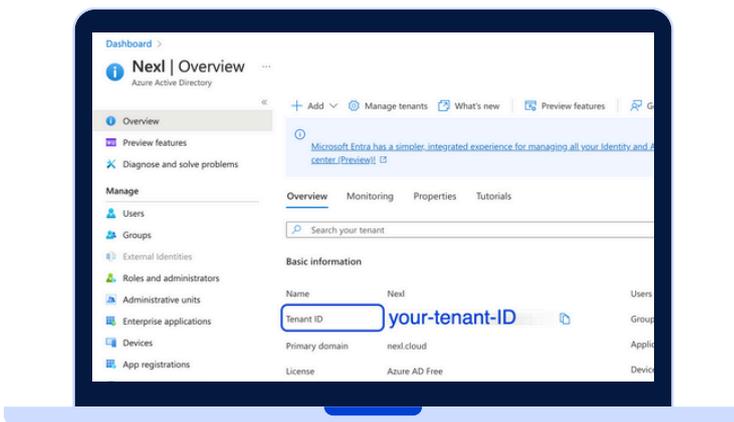


3. From your dashboard, select 'Azure Active Directory' from the lefthand menu.

# Setup Guide



4. Select 'Overview' from the Azure Active Directory menu.



5. From the Overview tab, locate and copy your tenant ID.

## Setup Guide

### Step 2: Share your Tenant ID and Admin User email with Nexl.

Send an email to Nexl's Client Services team with the following information:

1. Your Office 365 Tenant ID
2. The email address of the Admin user who will be providing consent to the Office 365 permissions.

The Nexl team will then create your Tenant on the Nexl system, and will notify you by email when this step is complete.

### Step 3: Provide consent to Office 365 permissions

1. Navigate to your Nexl login page, using the URL corresponding to your server location:

<b>Australia</b>	<a href="https://au.nexl.cloud">https://au.nexl.cloud</a>
<b>EU</b>	<a href="https://eu.nexl.cloud">https://eu.nexl.cloud</a>
<b>USA</b>	<a href="https://us.nexl.cloud">https://us.nexl.cloud</a>

**Note:** If you are a Private Cloud client, or if you are unsure which server region your account is hosted in, please contact the Nexl Client Services team.

2. Log in using the 'Office 365' option (ideally with the Admin user account for your Office 365).
3. Agree to allow users to log in to Nexl with Office 365.
4. Once logged in, click the 'Admin Connect' button on top of the page.
5. Grant access to the Nexl application.

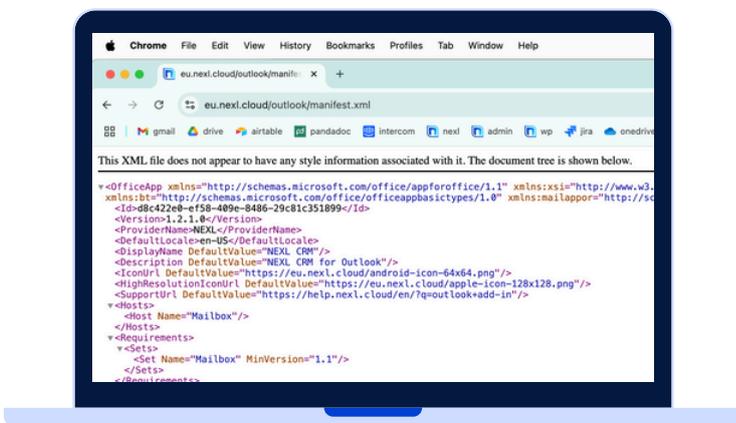
### Step 4: Notify the Nexl team that consent has been granted

Notify the Nexl team that consent has been granted. Once notified, we will begin monitoring our system to ensure the connection is working properly. After we've confirmed that user activity is being captured, we will begin any retrospective data imports you have purchased.

# Outlook Add-In Setup

Nexl's Outlook Add-In can be installed one of two ways: (1) on an individual user basis (one by one), or (2) on a firm-wide basis. See below for a step-by-step guide to each implementation option.

## INDIVIDUAL USER BASIS



1. Open a web browser and enter the URL corresponding to your server location.

**Australia:**

<https://au.nexl.cloud/outlook/manifest.xml>

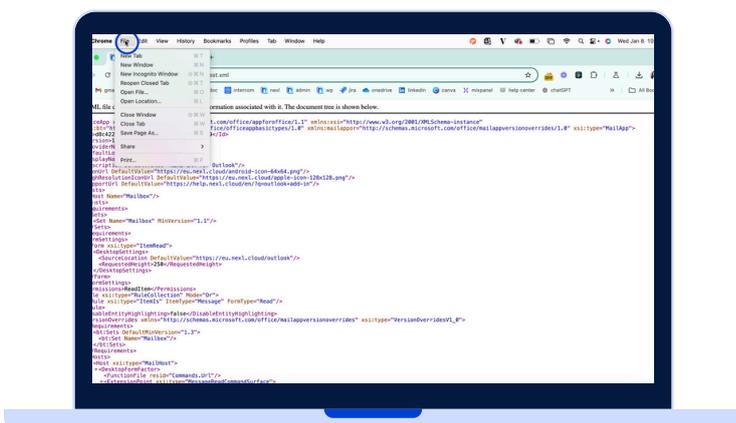
**EU:**

<https://eu.nexl.cloud/outlook/manifest.xml>

**USA:**

<https://us.nexl.cloud/outlook/manifest.xml>

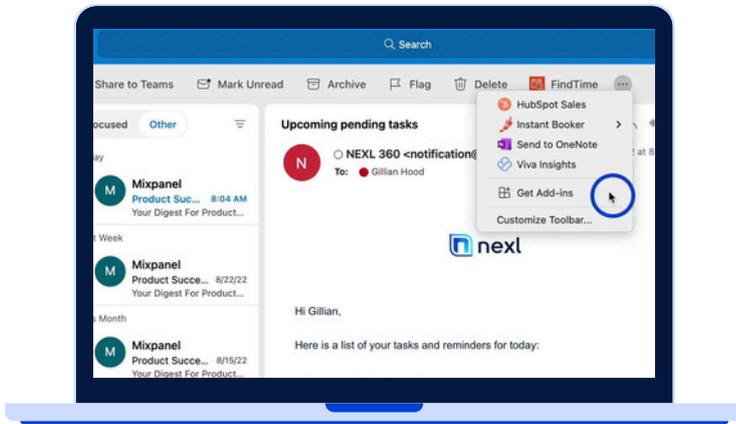
**Note:** If you are a Private Cloud client, or if you are unsure which server region your account is hosted in, please contact the Nexl Client Services team.



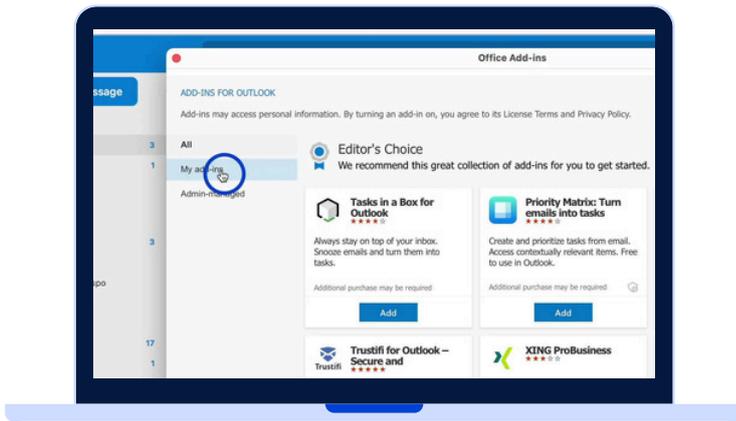
2. From the top menu, click 'File', then select the relevant option to save the page as a file (e.g. 'Save As', 'Save Page As', etc.)

# Outlook Add-In Setup

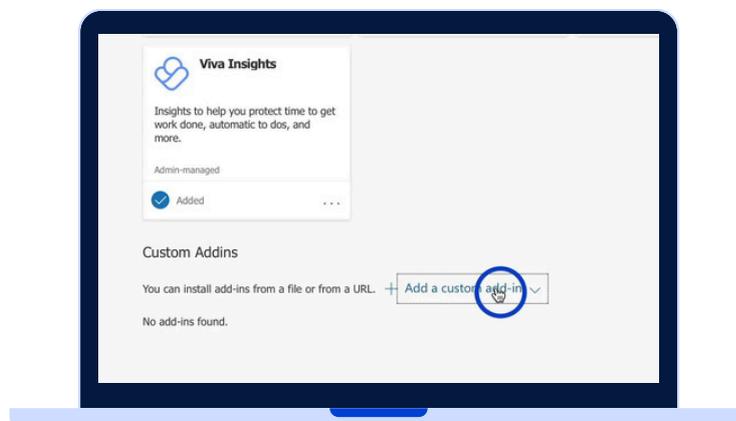
## INDIVIDUAL DEPLOYMENT



3. Open the Outlook desktop application.
4. Click the 'Get Add-ins' button. This may be displayed in your top ribbon, or in the three-dots dropdown menu.



5. From the Add-Ins menu, click 'My add-ins.'

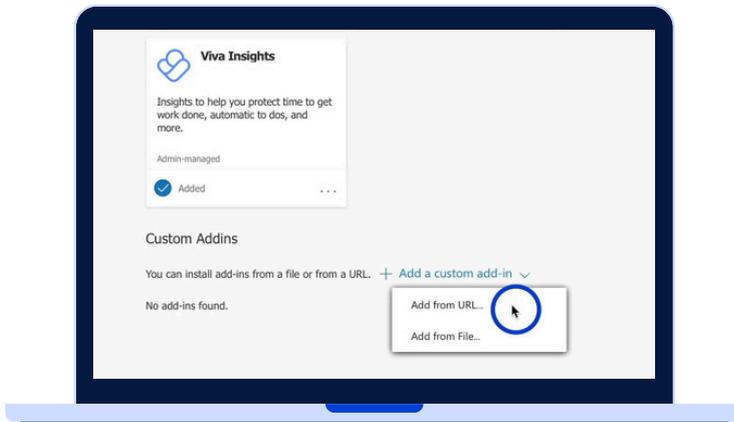


6. At the bottom of 'My add-ins,' select the '+ Add a custom add-in' dropdown.

OFFICE 365

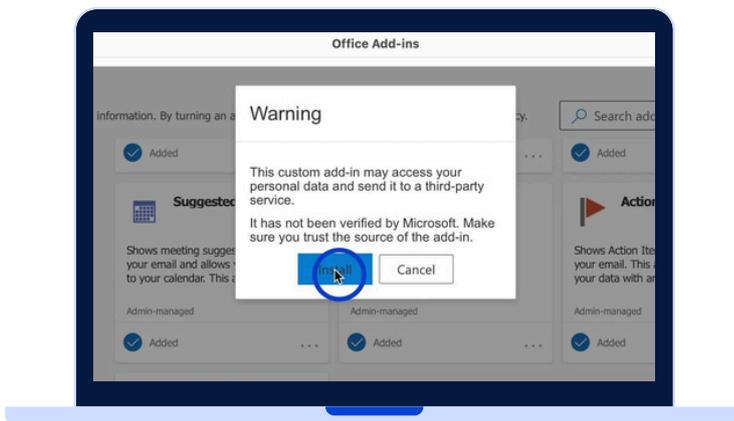
# Outlook Add-In Setup

## INDIVIDUAL DEPLOYMENT

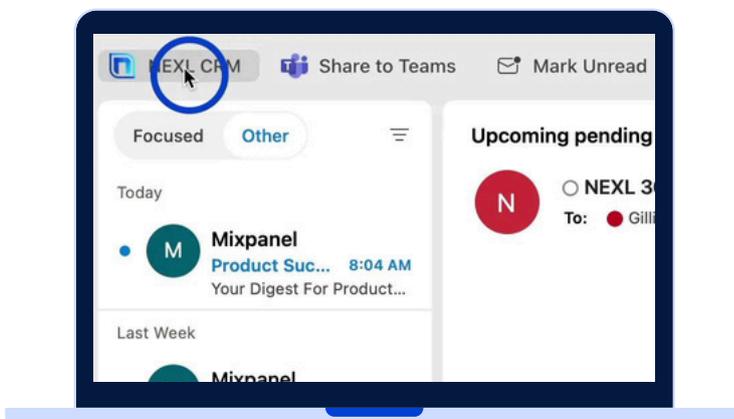


7. Select 'Add from file' from the dropdown menu.

8. Select the manifest file you have downloaded, then click 'Open.'



9. Click the 'Install' button.



10. Close the Add-in menu. You will now see Nexl in your Outlook ribbon.

11. Click the Nexl Add-in to open it, and use the Pin button to pin it to your dashboard.

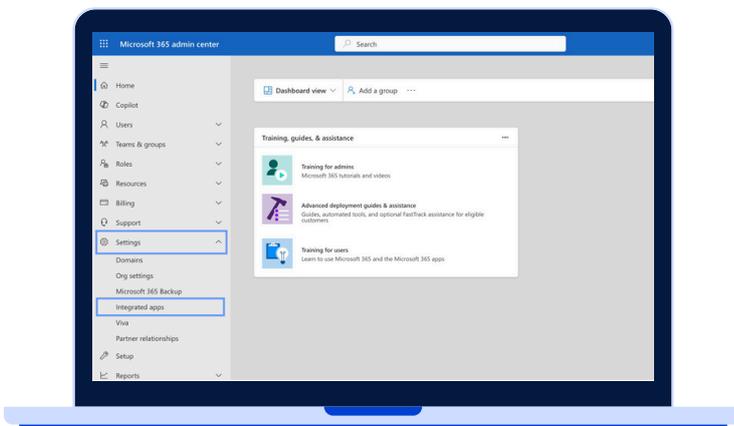
OFFICE 365

# Outlook Add-In Setup

## FIRM-WIDE DEPLOYMENT

Follow the steps below to use the Office 365 admin center to remotely deploy Nexl's Outlook Add-in to all your users.

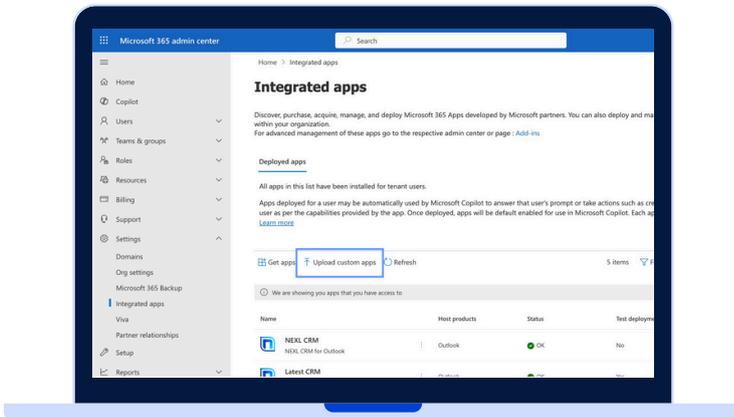
### Firm-Wide Basis



1. Go to the link below to log into the Office 365 admin center:

<https://admin.microsoft.com/Adminportal/Home/#/homepage>

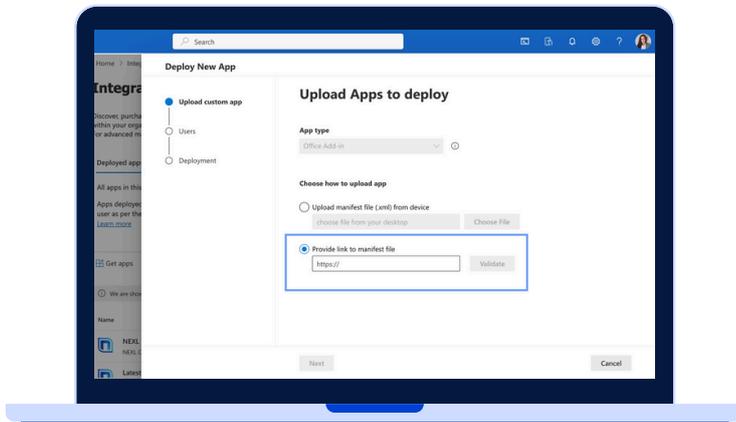
2. Open the 'Settings' dropdown, then select 'Integrated apps.'



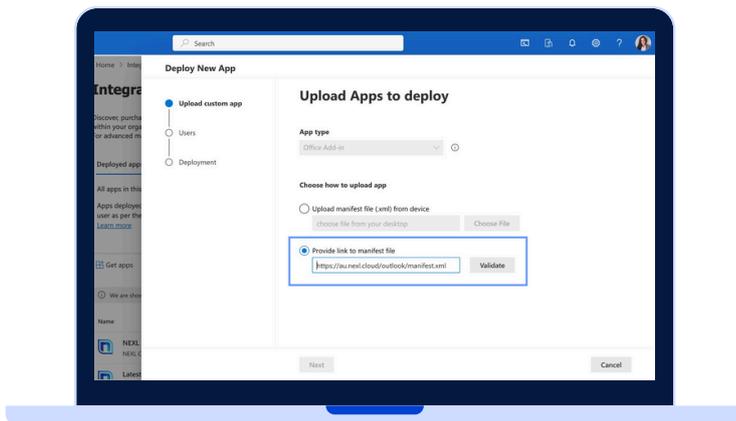
3. Select 'Upload custom apps.'

# Outlook Add-In Setup

## FIRM-WIDE DEPLOYMENT



3. In the 'Upload Apps to deploy' window, select 'Provide link to manifest file.'



4. Enter the URL corresponding to your server location, then click 'Validate.'

**Australia:**

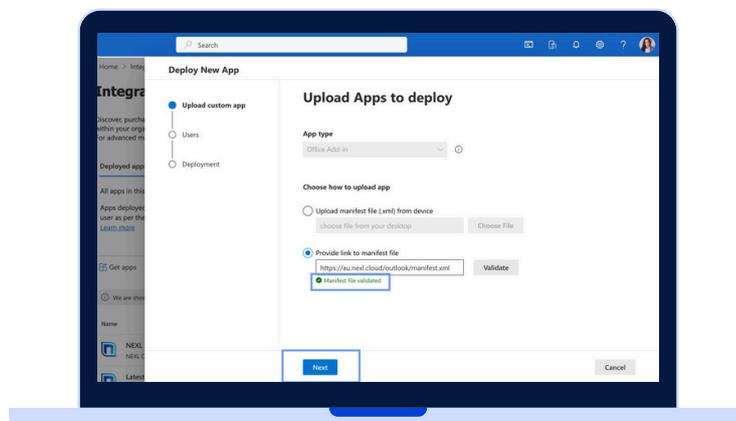
<https://au.nexl.cloud/outlook/manifest.xml>

**EU:**

<https://eu.nexl.cloud/outlook/manifest.xml>

**USA:**

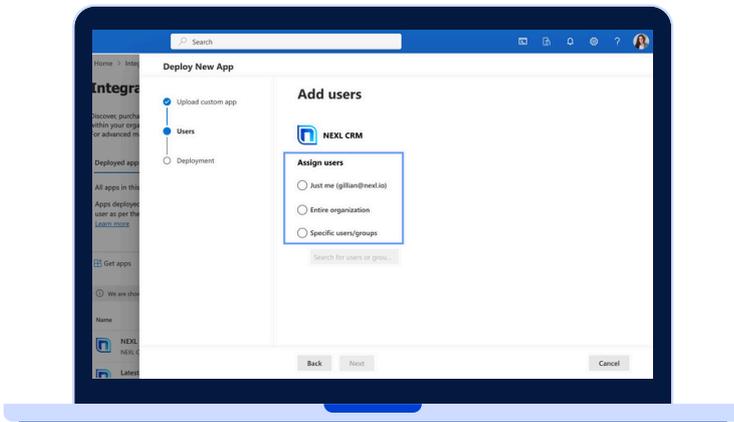
<https://us.nexl.cloud/outlook/manifest.xml>



5. Once the manifest file has been validated, click 'Next.'

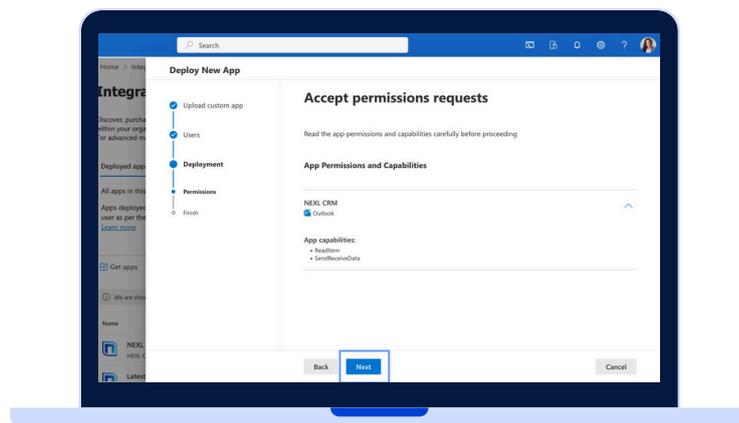
# Outlook Add-In Setup

## FIRM-WIDE DEPLOYMENT

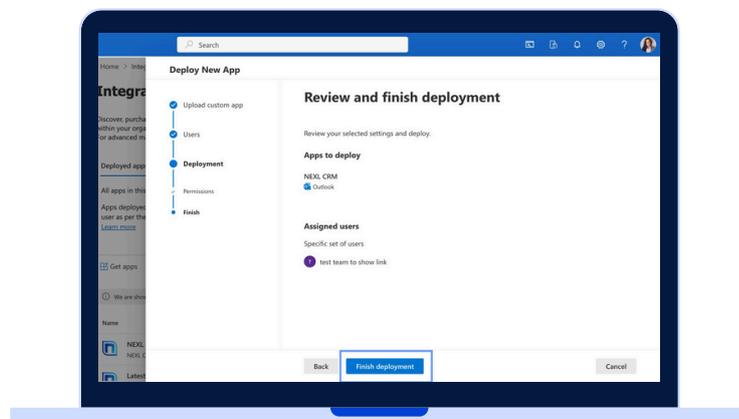


6. Under 'Assign users,' select whether to deploy the add-in to 'Just me,' 'Entire organization,' or 'Specific users/groups.'

(We recommend deploying the add-in to a smaller group for testing prior to firm-wide rollout, like your BD/Marketing team or early users.)



7. From the 'Accept permissions requests' page, click 'Next.'



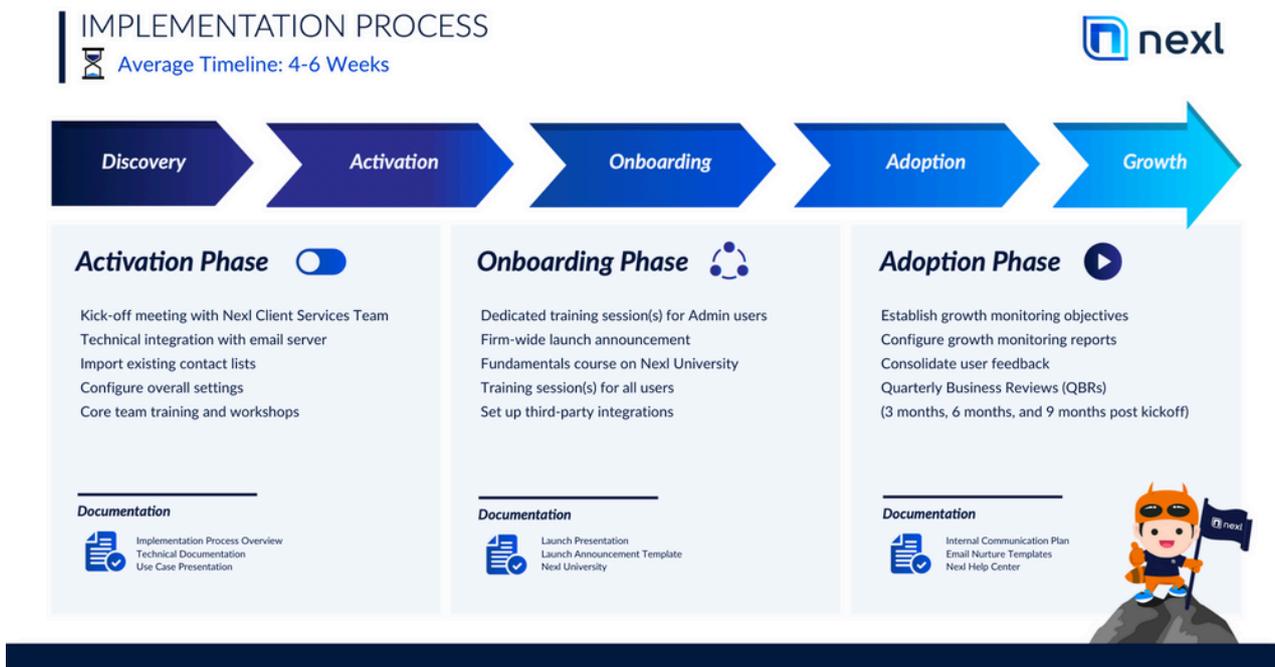
8. From the 'Review and finish deployment' page, click 'Finish deployment.'

**Note:** It may take up to 24 hours for the add-in to become visible to the selected users.

# Training

All of Nexl's training sessions will be held virtually in a webinar-style event for all participating users. Our training sessions focus heavily on specific BD and Marketing strategies to help your lawyers improve their business development efforts. Upon request, sessions can be recorded and made available to you.

For a high-level overview of our training and implementation process, please see the diagram below.



## Resources

In addition to our live training events, we also offer a number of 24/7 resources to help you learn and troubleshoot.

### Training Videos

We offer a number of self-paced video courses for both beginners and admin users. You can access our training videos at <https://learn.nexl.cloud>.

### Live Chat Support

We offer in-app chat support to answer your questions in real time. You can find our chat support on any page or section within Nexl, in the bottom right corner.

### Help Center

Nexl's Help Center is a collection of articles and how-to's that you can easily browse or search.

You can access Nexl's Help Center at <https://help.nexl.cloud>, as well as via our in-app chat support widget.



Steven Ongenaet

#### Nexl: Getting Started



With no prior experience, you will have the opportunity to walk through hands-on examples with Hadoop and Spark frameworks, two of the most common ...

Beginner

5 Lectures

1 hours

