

Technical Documentation

Security, Integration, and Implementation
Information for Microsoft Exchange

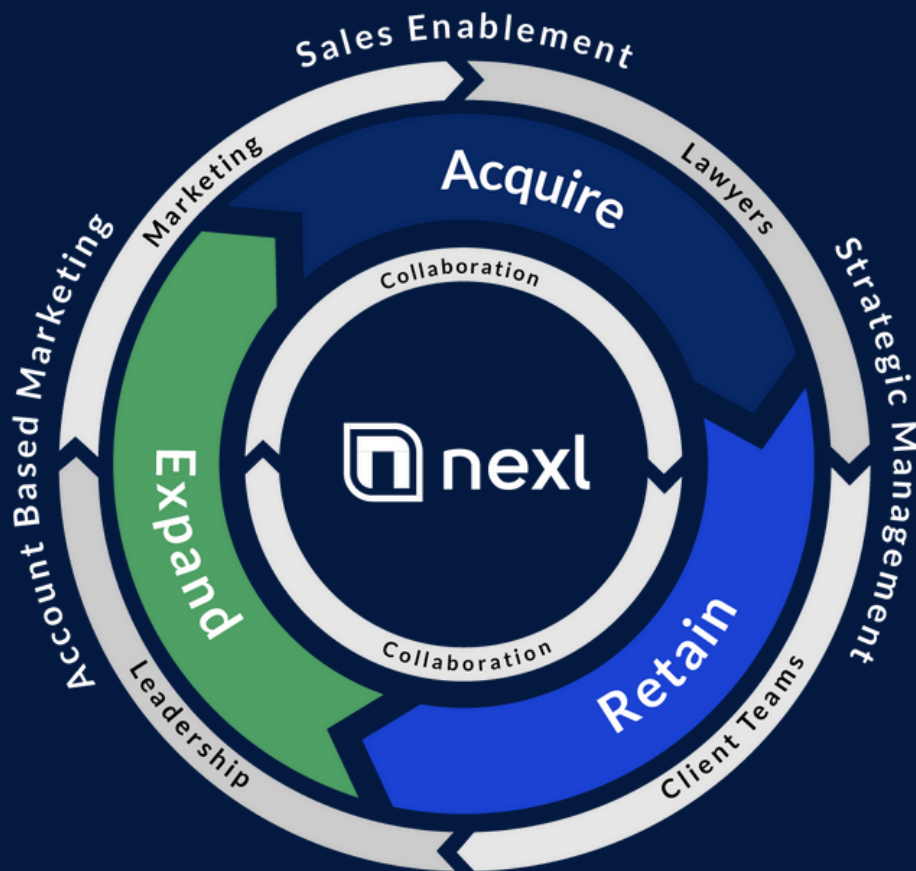


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Introduction

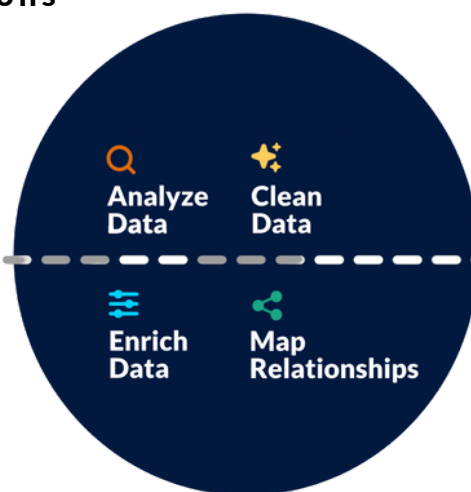
Nexl's products and services are transforming the way law firms grow, but the backbone of our success is providing a safe and trustworthy place for relationship and contact data. Protecting your and your clients' data is at the core of everything we do, from how we build our products to how we serve 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

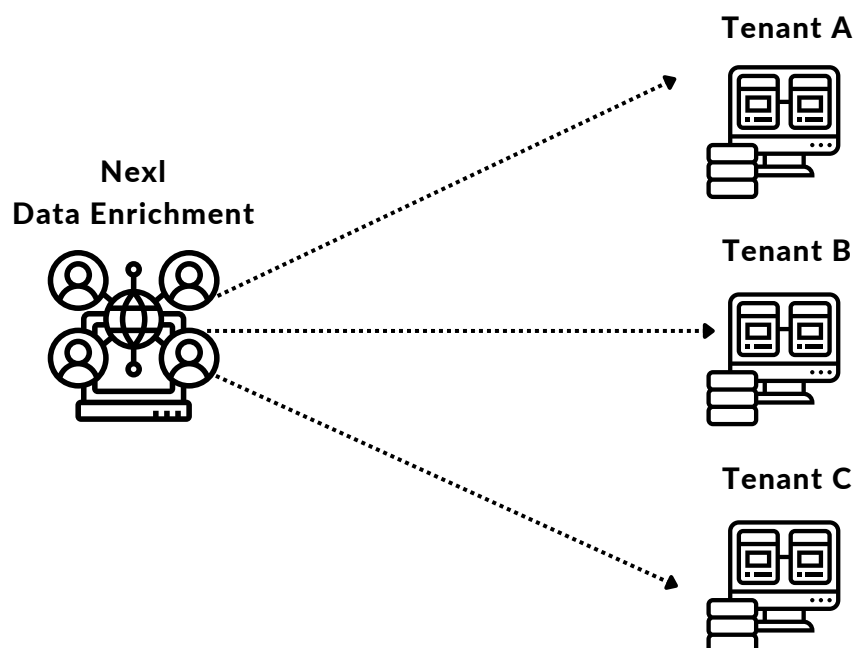
Name	Website
Description	Email
Logo	Phone Number
Employee Count	Address
Year Founded	LinkedIn URL
Industry	Twitter URL
Category	Other profiles
Keywords	

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 **Hybrid Exchange** integration works, as well as the respective steps for setup.

How the Microsoft Exchange Integration Works

Nexl connects with your Exchange Server using Exchange Web Service (EWS). For Nexl to access data using EWS, a Service Account or User Account is required. A service account can be added using the instructions in the Setup Exchange Service Account for NEXL document.

Otherwise a user can authorize only his/her account by clicking the “**Individual Connect**” button in the Nexl interface. The passwords for users/service accounts are stored in encrypted format at rest and are only accessible during runtime.

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.

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

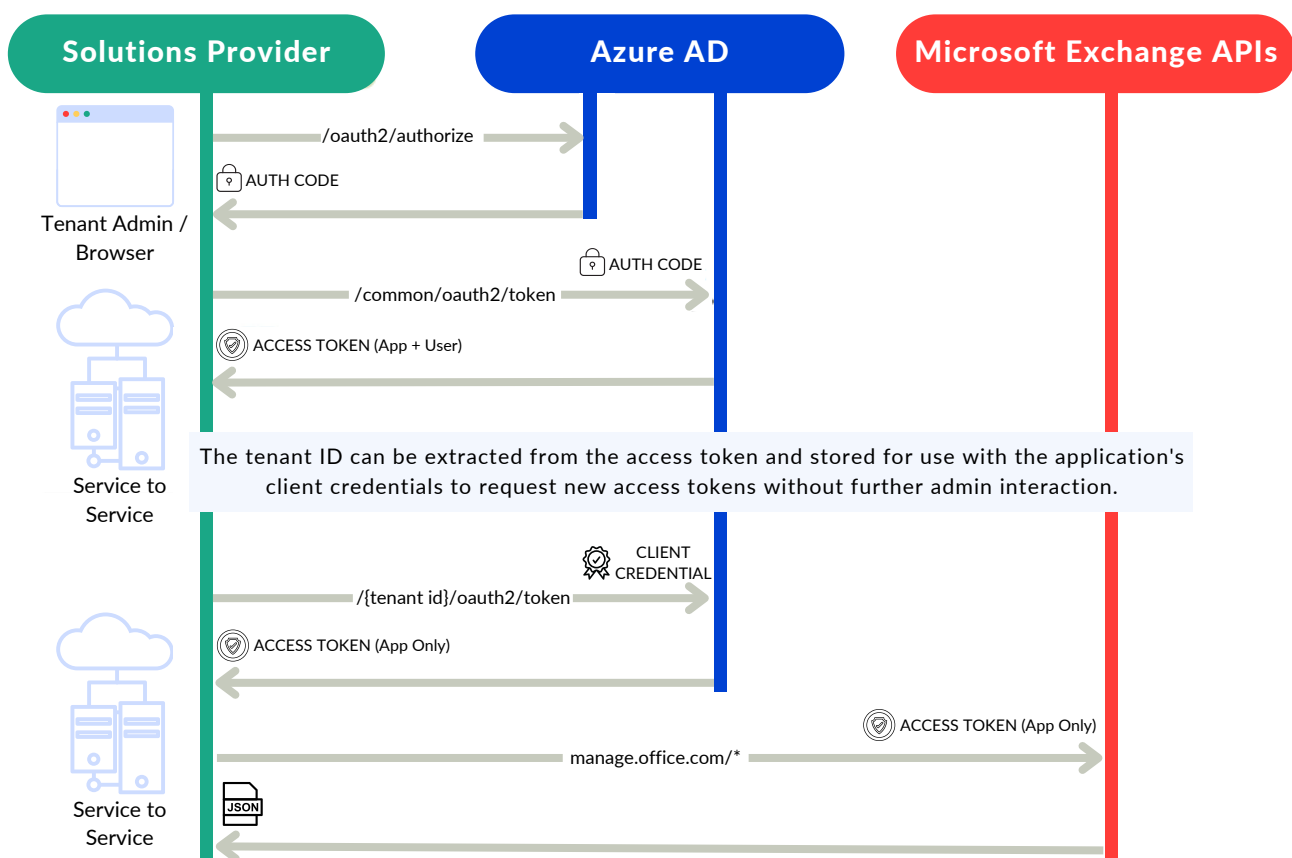
Tenant Authentication

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

Your Microsoft Exchange tenant admin must explicitly grant consent to allow Nexl to access your tenant data by means of the Microsoft Exchange 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.

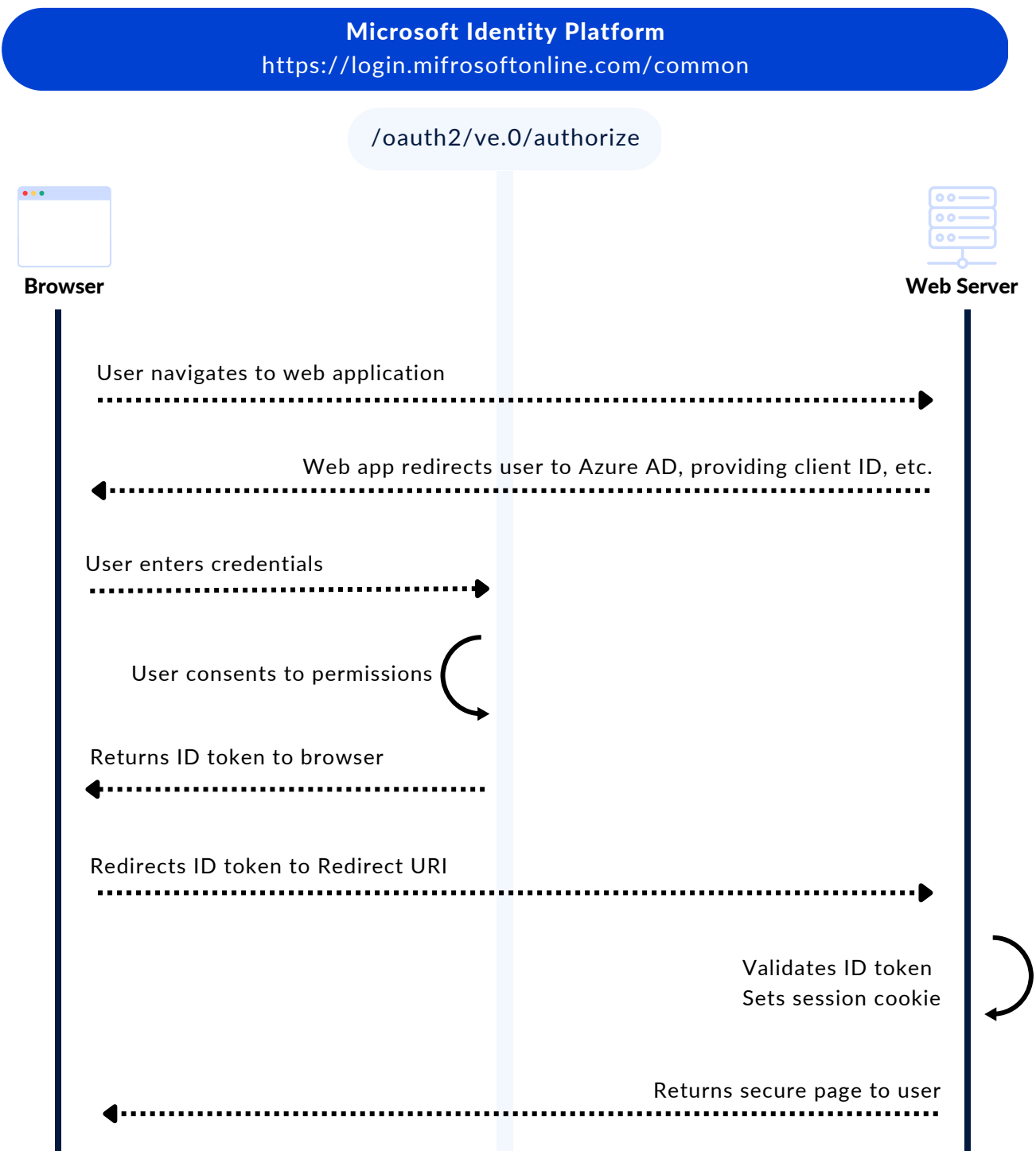
Once set up, Nexl continues to request additional access tokens on an ongoing basis, without the need for further tenant admin interaction. The access tokens are then passed to the Microsoft Exchange Management APIs to authenticate and authorize Nexl.

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



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.

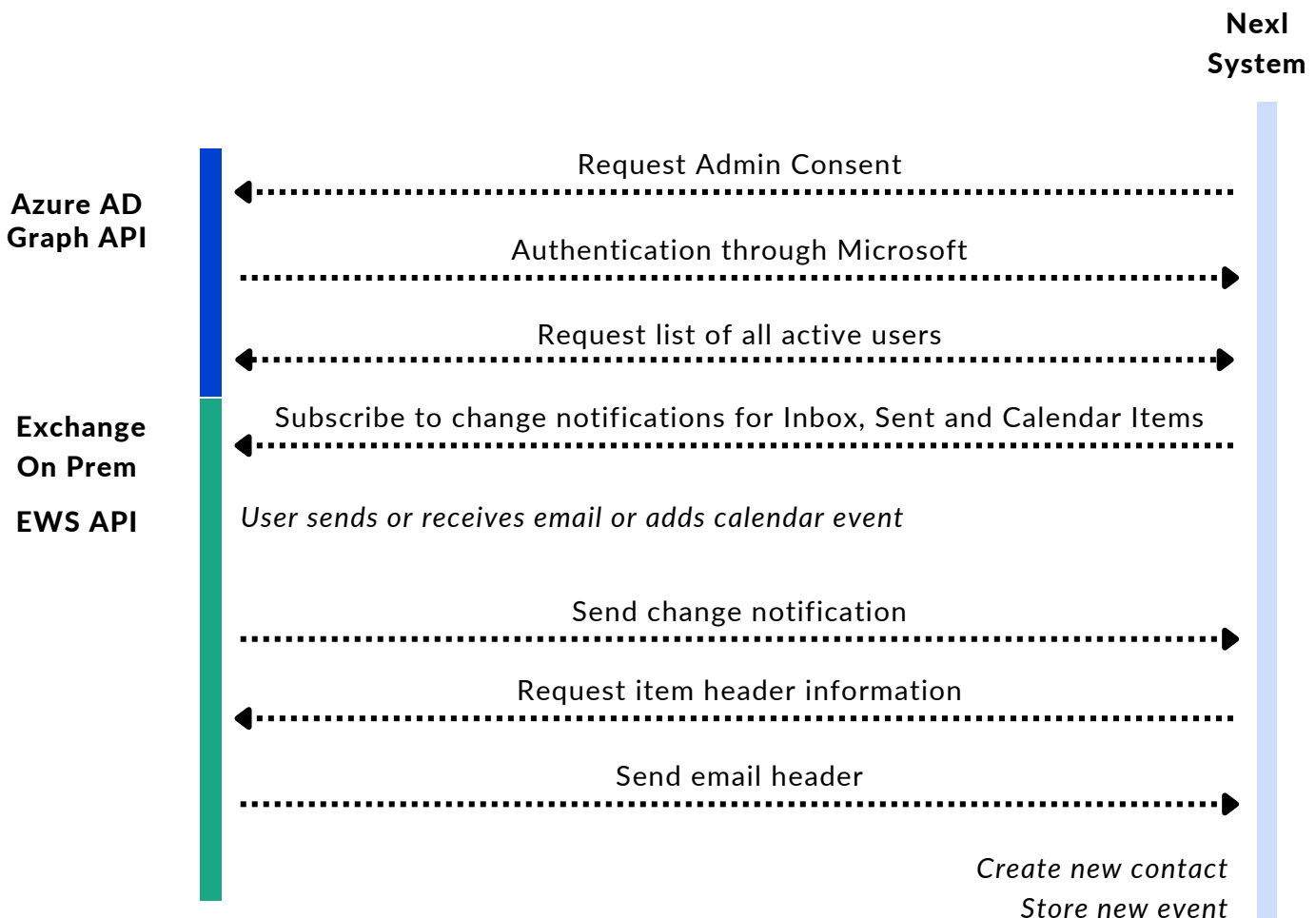


Change Notifications

Once the connection to Exchange has been set up, Nexl retrieves a list of users and active mailboxes. Nexl can then subscribe to change events in one of two ways. Push Subscriptions or Daily Sync.

When making use of push subscriptions Nexl listens for any changes to a users' mailbox/calendar by creating a subscription on the mailbox/calendar. When a new event is scheduled, an email sent or received, the Exchange server notifies Nexl. The event will contain an id of the item. Nexl will then retrieve the item from Exchange and process it. This ensures that your information is up to date in Nexl.

The alternative is to make use of daily synchronization. This means that every night Nexl will access Exchange and pull any information for the last day. This ensures that there isn't any extra load on the server during the day time when it's most in use, but comes with the downside that the information in Nexl is always out of date.



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 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.

Infrastructure Security

- Hosted on leading infrastructure providers (AWS, Azure)
- Network and Perimeter Protection
- Regional servers (EU, US, AUS)

Customer Data Protection

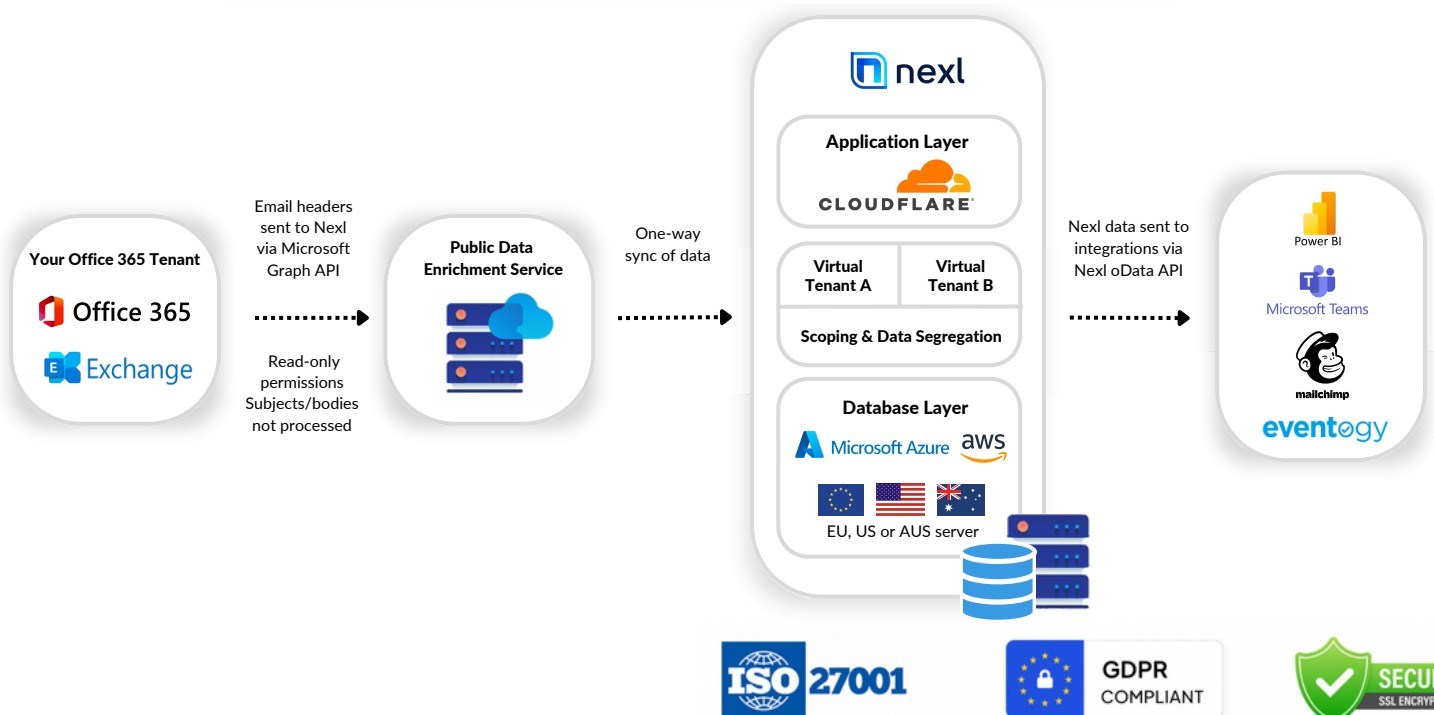
- Logical Tenant Separation (Private Cloud Available)
- Encryption In Transit (TLS 1.2, TLS 1.3)
- Encryption At Rest (AES-256)

Application Protection

- Web Application Firewall (WAF)
- Distributed Denial of Service (DDoS) Protections
- Regular Penetration Testing and Vulnerability Scanning

Application Protection

- 24/7 Monitoring and Incident Response
- Security Education and Awareness Training



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 Cloud Infrastructure	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 Cloudflare and Rollbar
Email Notification Delivery	SendGrid & MagicBell
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	https://nexl.cloud/privacy-policy/
Data Processing Agreement	https://nexl.cloud/data-processing-agreement/



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

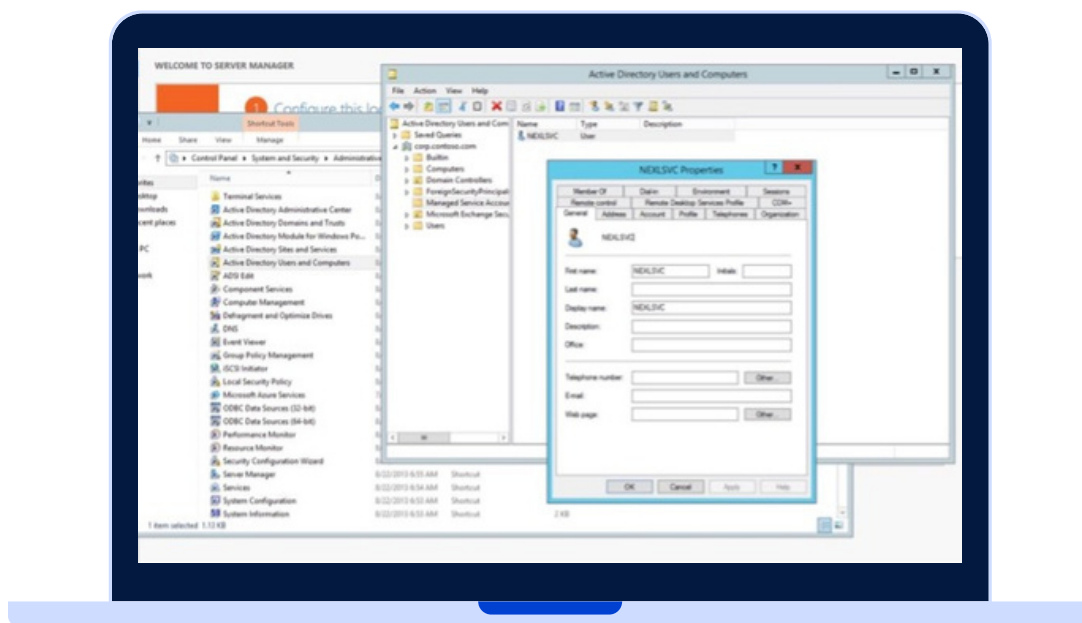
Implementation

Step 1: Create a new Active Directory user:

1. Open the Active Directory User management and create a new User. We suggest adding this to your Managed Service Accounts folder. Name the user: NEXLSVC.

Please create a password and note down the password. Set the password to never expire.

You can now close the Active Directory console and move to the Exchange admin console.



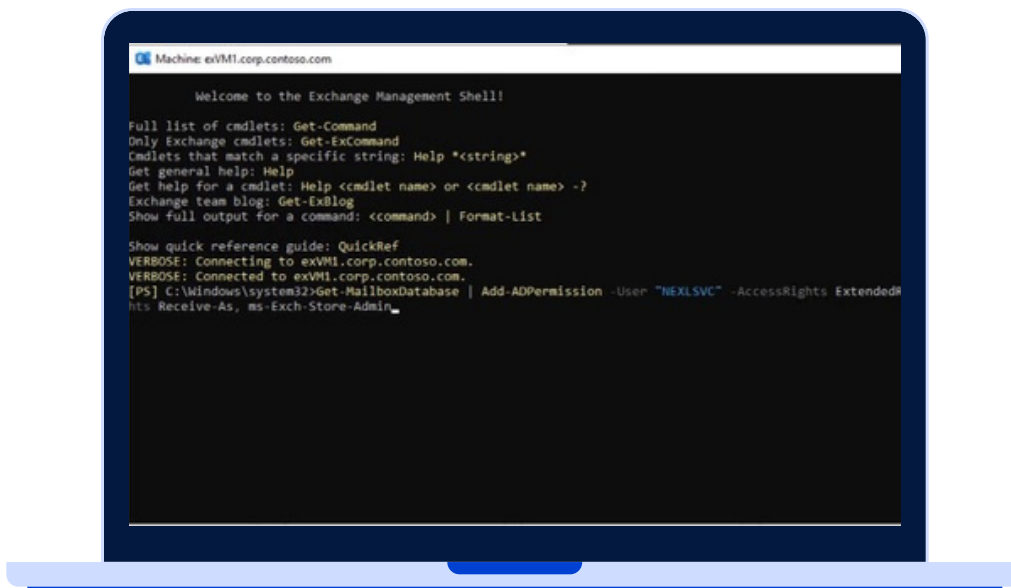
Microsoft Exchange

Setup Guide

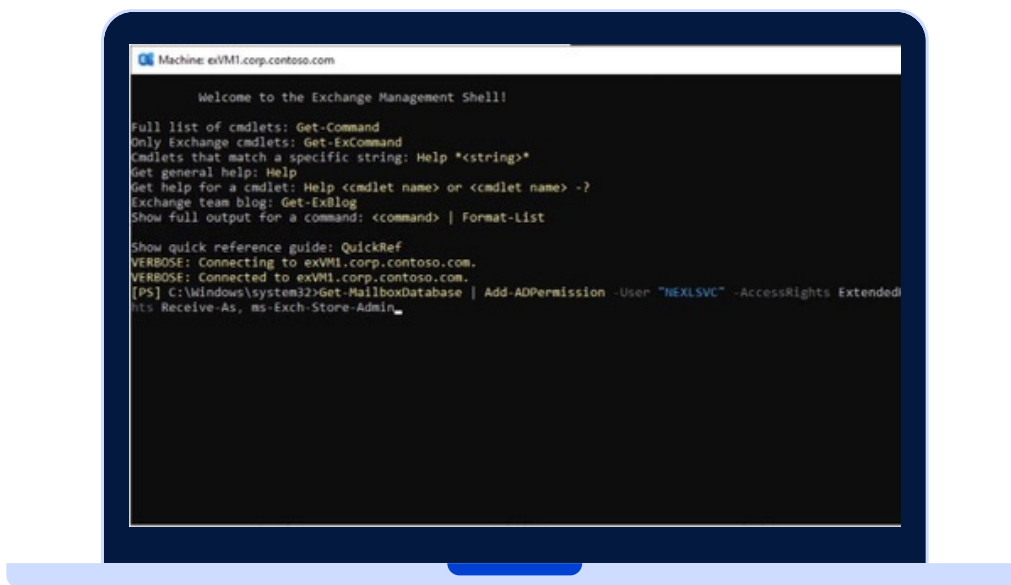
Step 2: Add Exchange permissions for new service account

Sign in to your Exchange server and open the Exchange Management Shell and run the following 2 commands:

Get-MailboxDatabase | Add-ADPermission -User "NEXLSVC" -AccessRights ExtendedRight - ExtendedRights Receive-As, ms-Exch-Store-Admin



New-ManagementRoleAssignment -Role:ApplicationImpersonation -User:NEXLSVC



And you're done setting up!

Setup Guide

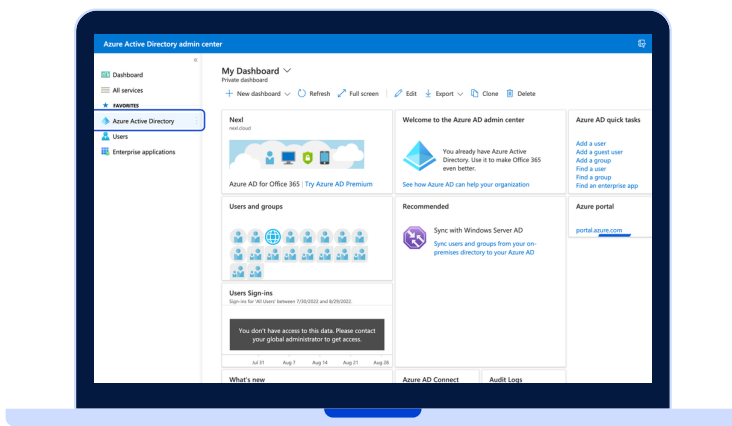
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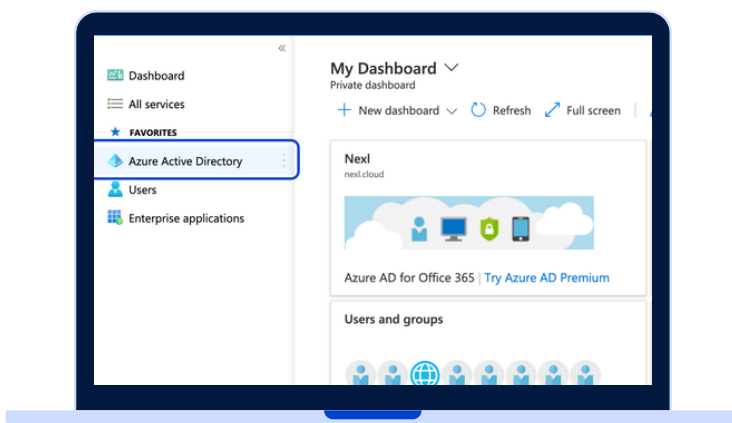
- Internet access
- Recent version of Google Chrome, Firefox, Safari, or Edge (You can access and use Nexl using IE11 but we do not officially support it)
- Office 2013 or newer (for Outlook Add-in only)
- Exchange On-Premise or Office 365 Exchange Online

Implementation



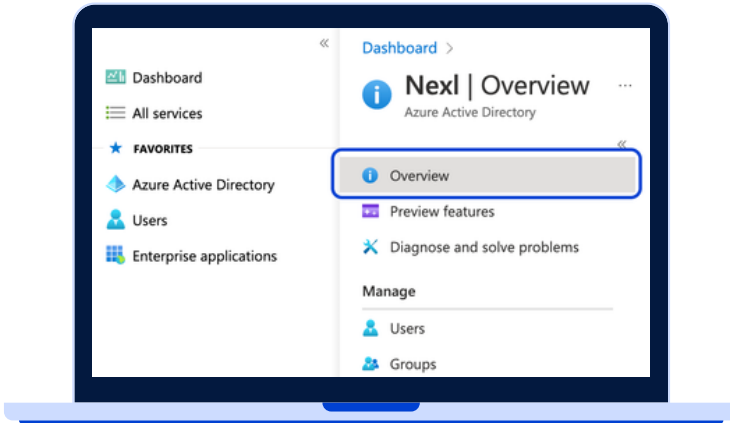
Step 1: Locate your Microsoft Exchange Tenant ID

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

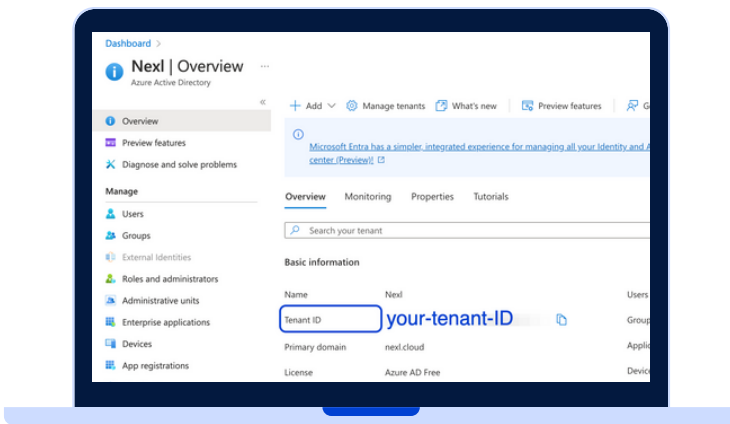


3. From your dashboard, select 'Azure Active Directory' from the lefthand menu.

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 Microsoft Exchange Tenant ID
2. The email address of the Admin user who will be providing consent to the Microsoft Exchange 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 Microsoft Exchange permissions

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

Australia	https://au.nexl.cloud
EU	https://eu.nexl.cloud
USA	https://us.nexl.cloud

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

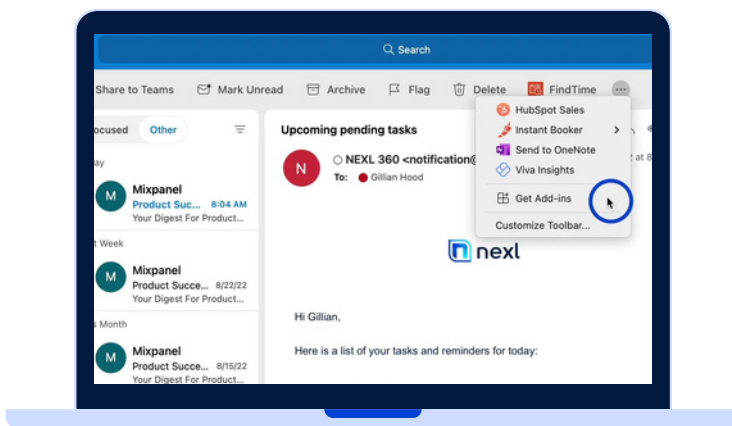
Notify the Nexl team that consent has been granted. Once notified, we will begin monitoring our system to ensure the connection is working properly. After we've confirmed that user activity is being captured, we will begin any retrospective data imports you have purchased.

Microsoft Exchange

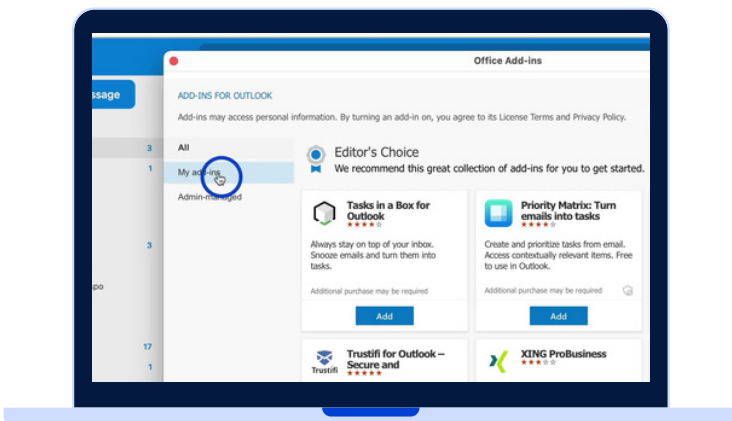
Outlook Add-In Setup

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

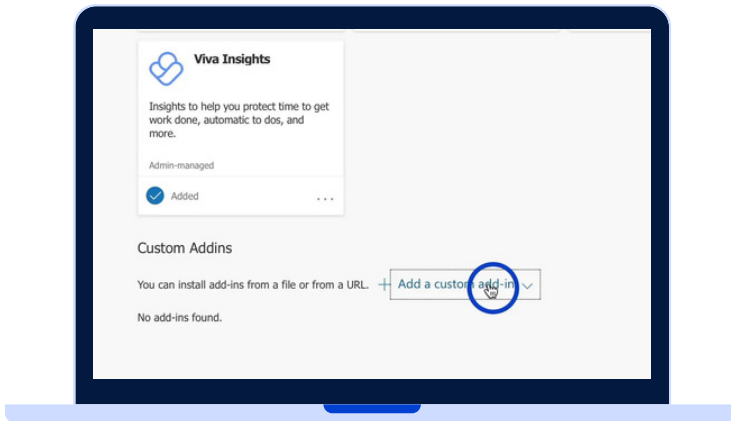


3. From the Add-Ins menu, click 'My add-ins.'

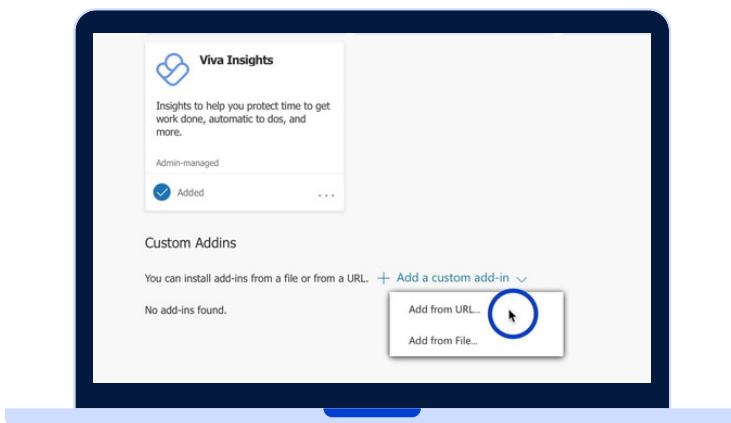
Microsoft Exchange

Outlook Add-In Setup

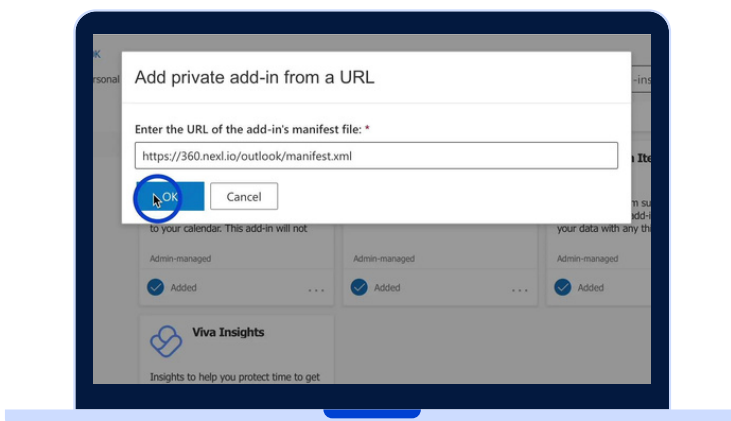
INDIVIDUAL DEPLOYMENT



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



5. Select 'Add from URL' from the dropdown menu.



6. Enter the URL corresponding to your server location, then click the 'OK' button.

Australia:

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

EU:

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

USA:

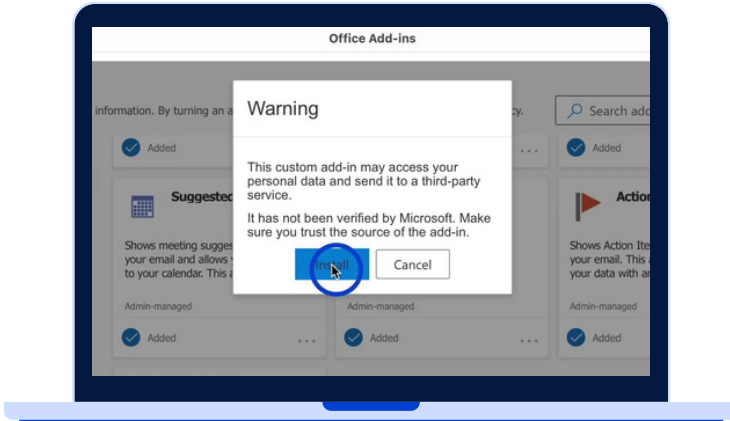
<https://us.nexl.cloud/outlook/manifest.xml>

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.

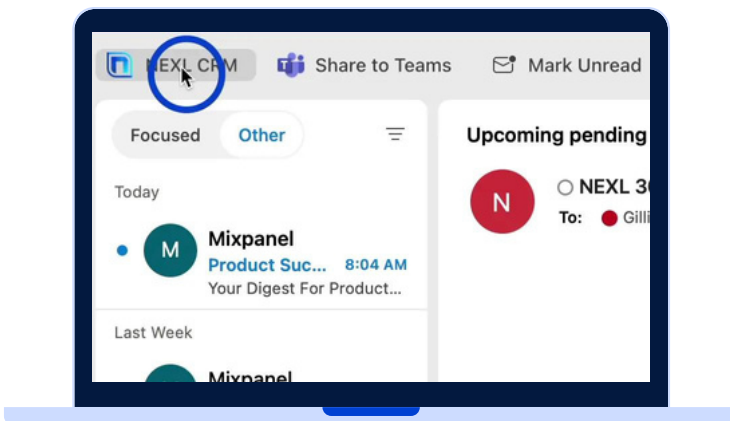
Microsoft Exchange

Outlook Add-In Setup

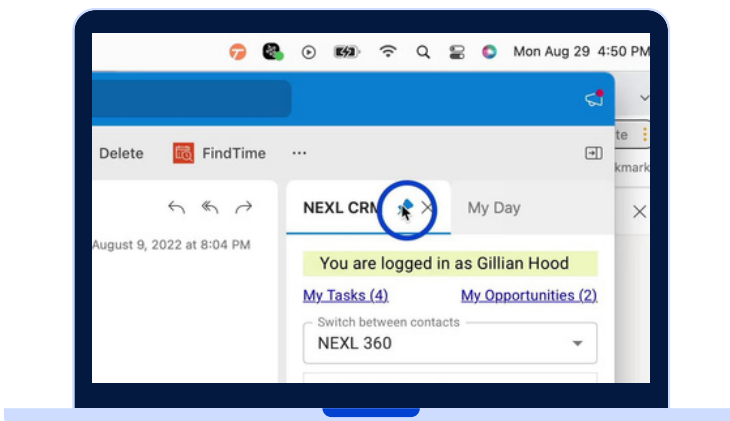
INDIVIDUAL DEPLOYMENT



7. Click the 'Install' button.



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



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

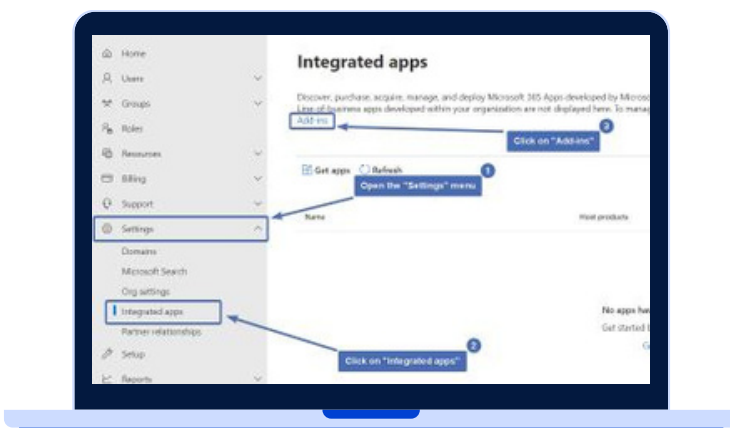
Microsoft Exchange

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.

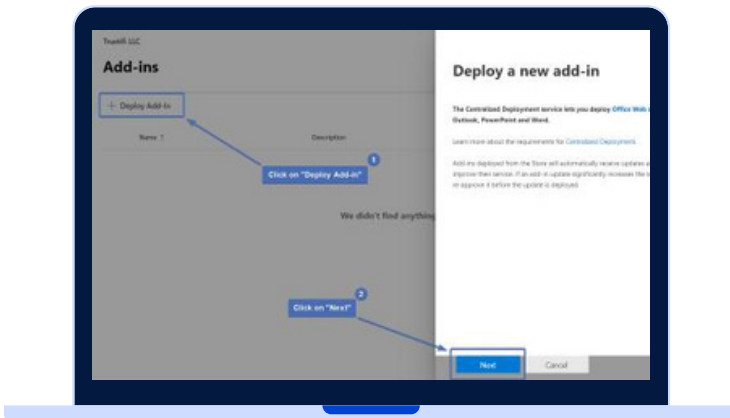
Firm-Wide Basis



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

[https://admin.microsoft.com/
&source=applauncher#/
Settings/AddIns](https://admin.microsoft.com/&source=applauncher#/Settings/AddIns)

2. Open the Add-in management page. (You can also navigate from the main admin center page by going to Settings > Integrated apps > Add-ins.)

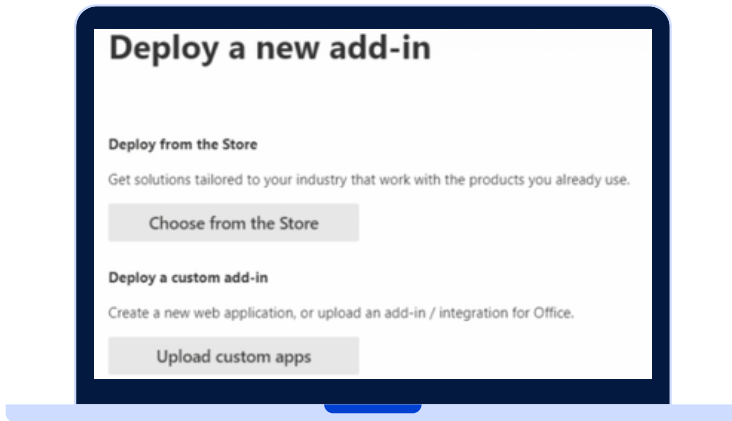


3. Select 'Deploy Add-in' at the top of the page, and then click 'Next.'

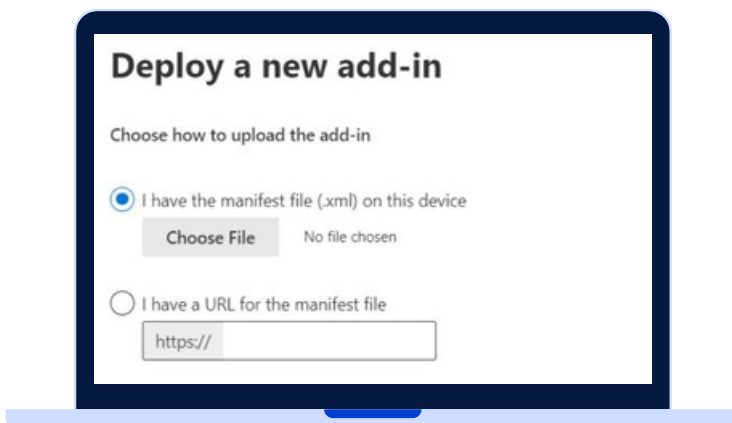
Microsoft Exchange

Outlook Add-In Setup

FIRM-WIDE DEPLOYMENT



3. In the 'Deploy a new add-in' window, select 'Upload custom apps.'



4. Select 'I have a URL for the manifest file.'
5. Enter the URL corresponding to your server location, then click 'Upload.'

Australia:

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

EU:

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

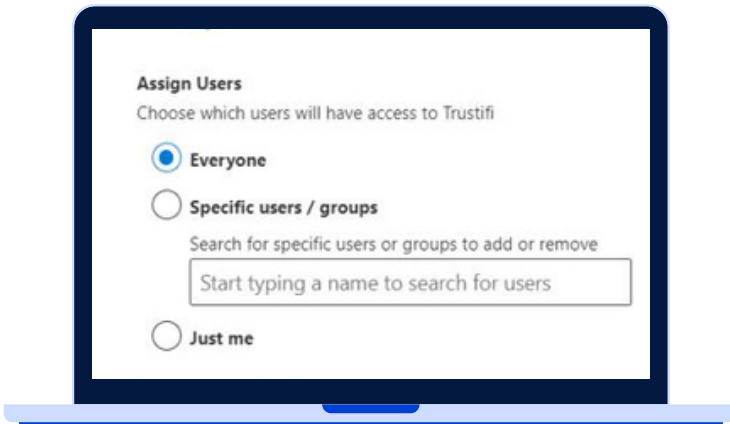
USA:

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

Microsoft Exchange

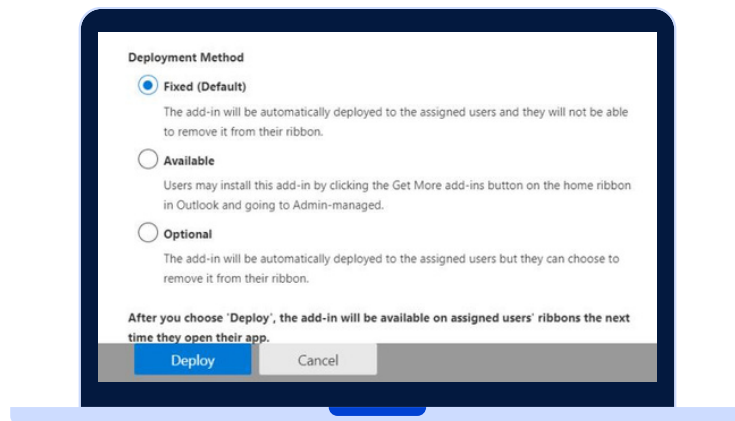
Outlook Add-In Setup

FIRM-WIDE DEPLOYMENT



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

(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.)



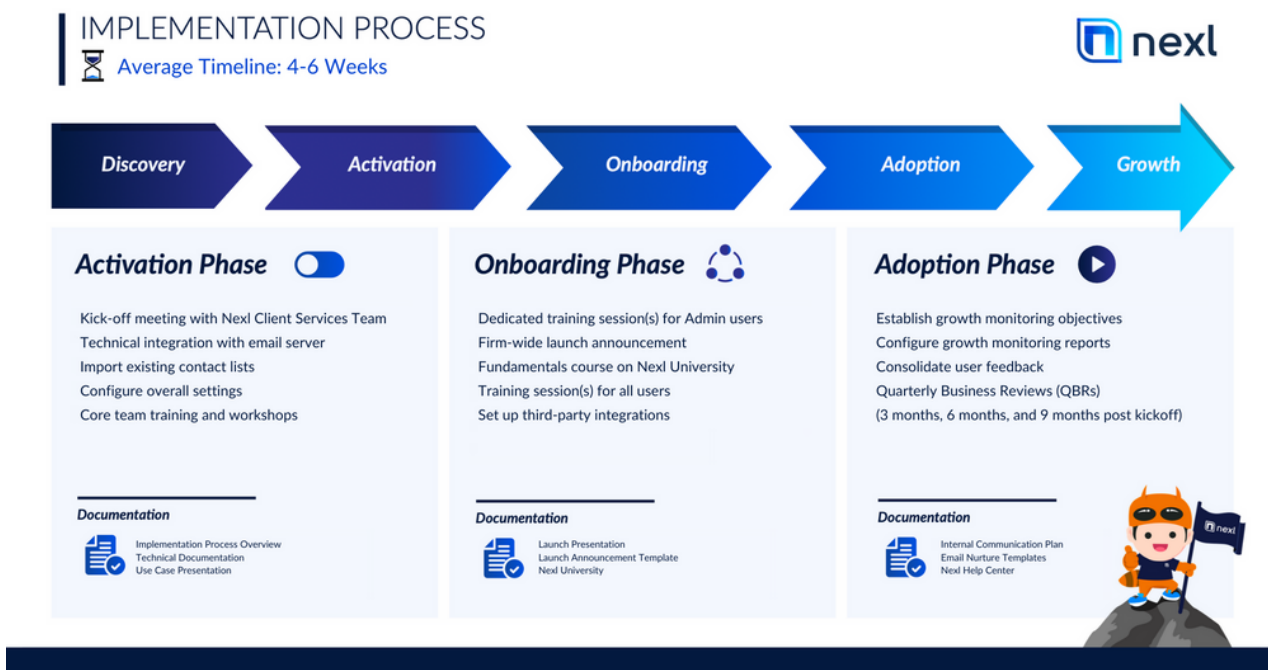
7. Select your Deployment method, then click 'Deploy.'

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://nexl.cloud/learn>.

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

