

# BORÉALIS FEATURES

## Access



### ACCESSIBLE FROM ANY WEB BROWSER

BoréalIS is a web-based application (or Software-as-a-Service – SaaS). This means you can access it from any web browser: Chrome, Internet Explorer/Edge, Safari and Firefox. All you need is the URL, your username and password.



### MULTIPLE AUTHENTICATION SOURCES

The BoréalIS Application supports several authentication protocols, including SAML and LDAP. Additional protocols are available upon request.



### MOBILE + TABLET ADAPTED

The BoréalIS Application is accessible using any mobile device. Use your default web browser.



### ROLE-BASED ACCESS

Different roles can be assigned to the users of the BoréalIS Application: admin, data entry, read-only, etc.



### MULTI-LANGUAGE INTERFACE

The BoréalIS Application is available in multiple languages: English, French, Spanish, and Russian. Please note that we are not using auto-translate: language is adapted to project/localization. The app can also be translated into your chosen language upon request.



### EASILY SHARE RECORDS AND REPORTS

Users can easily share records and reports with colleagues directly from the BoréalIS Application: add a note and selected users will receive it all via email.



### INVITE USERS DIRECTLY FROM THE APPLICATION

Users can invite other users directly from the application to set up your team rapidly.

## Business productivity



### UPDATE RECORDS VIA EMAIL

Copy emails to the application using the email provided (in the BCC or CC field) and the system will automatically create the communication and link it to participating stakeholders. If a stakeholder is not recorded in the application, it will be created.



### ATTACH EVIDENCES TO YOUR RECORDS

Add photos to your records to easily identify individuals and organizations. Add comments to provide an extra level of clarity for other team members. You can also add documents to any record, like for example a photo linked to a complaint.



### DUPLICATES MANAGEMENT OF STAKEHOLDERS

Make sure there are no double entries for the same individual or organization with the duplicates management feature. Using several criteria and factors, the application identifies potential duplicates. Users can then easily merge duplicates or keep records separate.



### EXCEL IMPORTS/EXPORTS

Import your data into the system using our Excel templates. Export data for external usage, for example provide evidence of engagement to auditors, or extract data for a corporate presentation.



## VALIDATION TO ENSURE DATA INTEGRITY

Several parameters are built into the app to ensure data consistency and quality. For example when you're entering an email contact in a form, the system will require @ and an extension (like .com) in order to accept it as valid data.



## GOOGLE MAPS API INTEGRATION

Automatic location of your stakeholders based on their address. Both regular map and earth views are available. The API integration also allows the same form auto complete you find in Google.



## CREATING STAKEHOLDERS FROM YOUR EMAIL CONTACTS

Upload your email contacts in the Boréal Application: it will automatically create a record for each individual using contact information.



## SHARED ADDRESS BOOK

The system offers a central repository of all the contact information of your stakeholders. You can even add multiple addresses per individual or organization.



## SAVE YOUR RECORDS AS PDF

You'd like to share or print a record? No problem, all the forms, reports and dashboards in the Boréal Application can be saved to the PDF format.



## KEYBOARD SHORTCUTS

Several keyboard shortcuts allow users to save time during data entry.



## EASY ACCESS TO CONTEXTUAL ACTIONS

Users can easily access the different actions relevant to the section they are editing or viewing.



## BORÉALIS API

Connect your various business applications with the Boréal Application.



## DRAG AND DROP / COPY-PASTE

Drag and drop relevant documents into your records. You can also use your clipboard to copy-paste images into your records. Update a stakeholder photo from a web data source in one action.



## TASK MANAGEMENT

Synchronize and maximize team efforts with the task management feature. Assign tasks to colleagues with target dates. Receive reminders and updates by email. Link tasks to specific activities, like communications.



## ADVANCED GLOBAL SEARCH

Global search allows users to search in the entire application, or in specific sections. This feature also includes all relevant records, even if they don't exactly match search criteria.



## BATCH ACTIONS\*

Select multiple records at a time to make actions by batch. For example, you can subcategorize communications related to a specific topic.



## INTELLIGENT FORM AUTO-FILL

The system remembers your last entries in order to facilitate data entry: it memorizes your usage and automatically completes sections with lists.



## CALENDAR INTEGRATION

Don't change your habits, visualize your Boréal shared calendars directly in Outlook or any other calendar.



## DOCUMENT MANAGEMENT

Manage and record all important documents linked to your activities in a central system accessible from anywhere.



## INTEGRATED GIS AND MAPPING\*

Import your project infrastructure to easily analyze stakeholder engagement activities related to your assets. Cross reference stakeholders and assets. You can geo-reference all data and therefore view it both on a map and in a form. Your geo-referenced data is available everywhere in the application. Integrate Boréal's with other corporate GIS web services to overlay social and environmental data.



## STAY UP TO DATE WITH THE LATEST TECHNOLOGIES

Our application is a standard platform with regular updates. Both customer feedback and our development team's innovation fuel product releases. Benefit from the latest tools and never worry about obsolete technology or security breaches due to unsupported technologies.



## MANAGE MULTIPLE SITES / PROJECTS\*

Your company has several projects located on different sites? That's great! Our app will ease managing activities across your different locations. Management can access information for all projects, while regional staff only access data about their project.



## HISTORY OF ALL COMMUNICATIONS

Ever wondered what you told a person regarding a particular event in an email communication that dates from a year and a half ago? Well, with our integrated Communications feature, access communications history with all your stakeholders in a few clicks.



## MULTIPLE GRAPHS AVAILABLE

We know you like to analyze your data in any possible way. That's why we offer over 10 different graphs in our Analytics tool: column stacked, bar, bar stacked, line spline, area, area spline, area stacked, pie, half donut, pyramid, scatter plot, etc.



## DRILL-DOWN GRAPHS, MAPS AND LISTS

Access detailed information directly from your graphs and maps. For example click on a graph about complaints and directly access the detail of complaints about noise, or locate them on a map.



## AUDIT (AND ACTIVITY) TRAIL

Every action users make in the Boréal's Application is traceable. This is useful when you wonder which team members edited a record last, and also ensures transparency when it's time for internal or external audits.



## CONFIGURABLE MENUS / CUSTOM FIELDS\*

Many of us use different lingo to refer to the same thing. We say organization, you say company? No problem! Configurable menus and custom fields let you choose the terminology in the app.



## BUILT-IN / CUSTOMIZABLE DASHBOARDS

Create your own social performance dashboards. You can use the built-in templates or make your own from scratch. Insert KPIs, maps, tasks, lists, and graphs for a visually compelling interpretation of your data.



## INFORMATION CONFIDENTIALITY (DATA SEGREGATION)\*

We know some of the data you handle is sensitive. That's why we integrated data segregation so only the users with the right access level can access sensitive data.



## SCHEDULED REPORTS

Receive monthly stakeholder engagement and other reports in your mailbox. You can also make sure team members also receive them.



## AUTOMATION TO REINFORCE DATA QUALITY

The several automations built into the application help users ensure the quality and consistency of data. Ex: Linking gender to specific titles.

## Business intelligence



### EMAIL NOTIFICATIONS AND REMINDERS\*

Never miss a beat with email notifications and reminders. You set up your own rules, so you get just as many as you choose.



### PDF REPORTS

Extract data from the Boréalès Application with custom reports.



### STAKEHOLDER MAPPING

Get a quick view of your stakeholders' impact and influence based on their recorded communications.

## Customer care



### ONLINE HELP CENTER

Need a little reminder or documentation to send to new users? We've got you! Our online help center contains lots of valuable tools to assist you. This is also where you'll find the details of every release of new features.



### DEDICATED SUPPORT

(ACCOUNT DIRECTOR + TECHNICAL SUPPORT)

We know data management isn't as simple as 1, 2, 3. That's why we're dedicated to help you on your journey, and simplifying your work is one of our top priorities.



### ON-DEMAND LIVE TRAINING

Our dedicated Customer Care Team is there to help! You'd like to book some training for your team? Just contact us and we'll schedule one-on-one or group trainings, available both online or on site.



### LOCAL PARTNERS

Boréalès counts numerous strategic partners all around the world. They can either help with on the ground operations, training, and even support.

## Data security



### TIER 3 CERTIFIED DESIGN AND SSAE 16 COMPLIANT DATA CENTER

Boréalès hosting services are deployed in a Tier 3 certified design data center. Our data center is certified ISO 27001:2005 for providing and operating dedicated cloud computing infrastructures. The data center is based on the ISO 27002 and ISO 27005 security management and risk assessment norms and associated processes. The data center has obtained SOC 1 and 2 type II certifications.



### DISASTER RECOVERY

(OFFSITE MIRRORING OF APPLICATION + DATA)

Boréalès uses multiple data centers to host its application and data, providing essential redundancy. All data centers employ physical security, strict access policies and secure vaults and cages. The disaster recovery center is located at more than 160 km (100 miles) from the production data center.



## Data security



### REDUNDANT ENTERPRISE-GRADE FIREWALLS + INTRUSION DETECTION SYSTEM

The BoréalIS network is protected by redundant enterprise grade firewalls and Intrusion Detection System (IDS) to monitor network traffic in order to block a wide range of known and unknown vulnerability exploits and protect against DoS/DDoS attacks.



### DATA SEGREGATION FOR ENHANCED SECURITY

Data segregation in the application makes sure your sensitive data is only accessible to users with the right access level.



### HIGH AVAILABILITY SERVERS

All BoréalIS services are configured for high availability with automatic failover capabilities.



### DATA CONFIDENTIALITY

You're the one and only owner of your data. This means that when you choose BoréalIS, all the information you input in the system is yours. Want to export all of it? Just ask us and we'll do that for you.



### HISTORY OF ALL EXPORTS

The BoréalIS Application records all data exports as an activity with the date and user.

## Configuration

### YOU CAN CONFIGURE THE FOLLOWING ITEMS IN THE BORÉALIS APPLICATION:

- Menus (drop down)
- Fields / Labels
- Reports
- Dashboards (Analytics)
- Branding
- Surveys
- Workflows
- Maps
- Role access – define which users have which rights
- Data segregation – define who can see / modify what
- Compensation rules (entitlement matrix)

All fields marked with \* are add-ons (PRO or Security Packs)