



Box Crawler Setup

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Introduction

This is a short guide aimed at showing how to configure Box to enable the SimSage Box crawler.

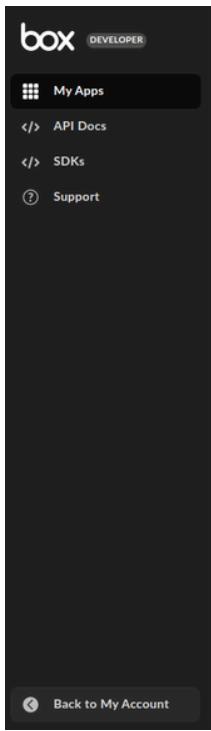
Prerequisites

In order to create a SimSage Box crawler, we must first have the following credentials at hand:

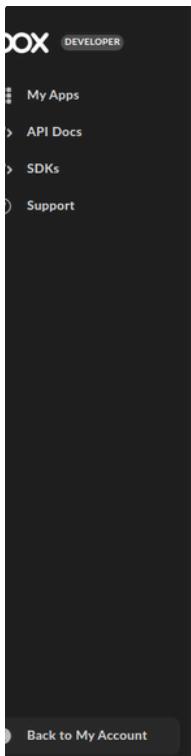
- Client ID
- Client Secret
- Enterprise ID
- Folder List

Setting Up

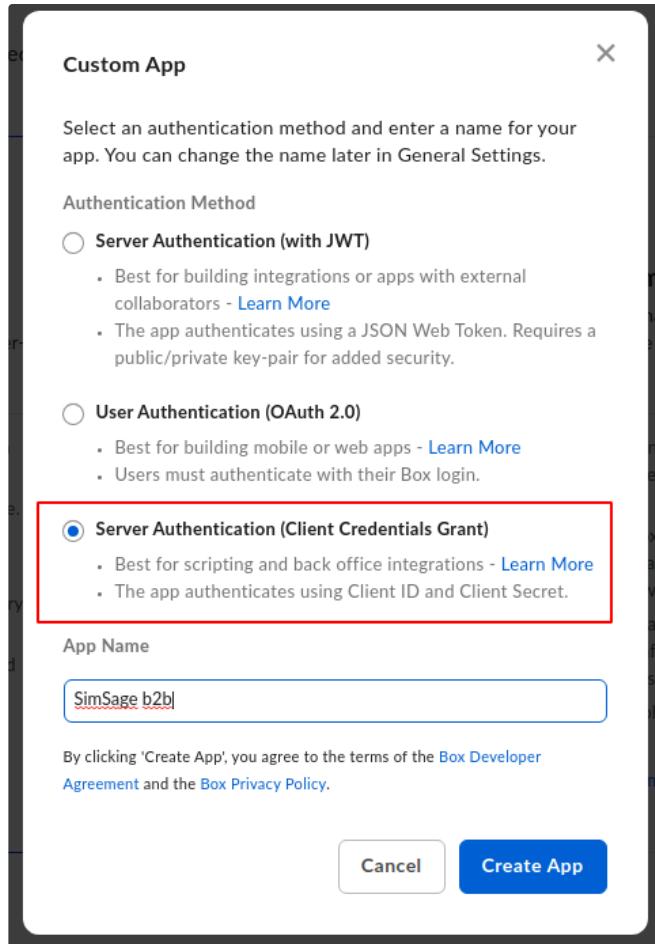
Sign-in to your Box account and visit <https://app.box.com/developers/console>:



Click "Create New App" in the top right-hand corner



Select "Custom App"



Select “Server Authentication (Client Credentials Grant)”

Give the App a name, the example name given here is “SimSage b2b”.

Click “Create app”

SimSage b2b

General Settings Configuration Webhooks Authorization App Diagnostics

Request app authorization, manage collaborators

App Info

App Name: SimSage b2b

Contact Email: rock@simsage.nz

Date Created: February 24, 2022 at 8:29:27 AM PST

User ID: 123456

Enterprise ID: 1341231

Collaborators

Collaborators: rock@simsage.nz (Admin)

Add New Collaborator

Back to My Account

Copy the “Enterprise ID” shown on the screen, this number is required by the SimSage Box crawler (the example show “1341231” as the Enterprise ID”).

Click the “Configuration” tab

SimSage b2b

General Settings Configuration Webhooks Authorization App Diagnostics

Manage authentication methods and app permissions

OAuth 2.0 with Client Credentials Grant (Server Authentication)

- Best for scripting, prototyping, and back office integrations.
- The app authenticates directly to Box using a Client ID and Client Secret.
- Request authorization for Enterprise Access.
- The app has its own user generated upon authorization (Service Account user).

View Documentation

Developer Token

18	JPK29	COPY
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Revoke

Created: February 24, 2022 at 8:29:28 AM PST

Expires: February 24, 2022 at 9:37:57 AM PST

OAuth 2.0 Credentials

Client ID: jh	Client Secret: h4b1	COPY
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Back to My Account

Copy the Client ID visible in the Oauth 2.0 Credentials section. this ID is required by the SimSage Box crawler. Scroll down the page until you see the App Access Level and switch to “App + Enterprise Access”.

SimSage b2b

General Settings Configuration Webhooks Authorization App Diagnostics

Manage authentication methods and app permissions

Save Changes

App Access Level

The app access level determines which users and content your app may access. All Server-to-Server apps authenticate using an access token for the Service Account (Automation User) by default. [Read more about the Service Account.](#)

App Access Only

- ✓ Service Account and App Users only. [Learn more.](#)
- ✓ Access to content created by your app.
- ✗ Cannot manage Enterprise settings, content, or users.

App + Enterprise Access

- ✓ All users
- ✓ Manage Enterprise settings, content, and users.
- ✗ Limited access to External Unmanaged Users.

Application Scopes

The app scopes determine which endpoints and resources your app can successfully call. [Learn more about all of our scopes.](#)

Content Actions

Read all files and folders stored in Box
Access to content is further restricted by the users' permission and Access Token used.

Write all files and folders stored in Box
Necessary to download files and folders. Access to content is further restricted by the users' permission and Access Token used. Read access is required when Write access is selected.

Manage signature requests
Interact with Box Sign endpoints. [Learn more about Box Sign APIs.](#)

Administrative Actions

Manage users

Back to My Account

SimSage b2b

General Settings Configuration Webhooks Authorization App Diagnostics

Manage authentication methods and app permissions

Save Changes

Developer Actions

Manage webhooks

Enable integrations

Manage Box Relay
Interact with Box Relay endpoints. [Learn more about Box Relay APIs.](#)

Advanced Features

Choose which advanced features your application requires. Warning: These should only be used for server-side development. [Learn more.](#)

Make API calls using the as-user header

Generate user access tokens
Allows your application to generate another users' access tokens using a grant instead of requiring their credentials

CORS Domains

Comma-separated list of Origins allowed to make a CORS request to the API. For security purposes, enter only those used by your application. Avoid the use of trailing slashes in the URL unless specifically required. [Learn more.](#)

Allowed Origins (optional)

https://mydomain.com, https://mydomain2.com

Back to My Account

Scroll down to the bottom of the page and find the “Advanced Features”. Check the “Make API calls using the as-user header” and “Generate user access tokens” boxes.

Click “Save Changes”, you should see “Successfully update the app.” as shown below.

Successfully updated the app.

General Settings Configuration Webhooks Authorization App Diagnostics

Manage authentication methods and app permissions

Developer Actions

Manage webhooks

Enable integrations

Manage Box Relay

Interact with Box Relay endpoints. [Learn more about Box Relay APIs](#).

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Allowed Origins (optional)

https://mydomain.com, https://mydomain2.com

Save Changes

You now need to “enable” this application. The Box administrator must approve these changes. If you are the Box administrator, you will receive an email requesting approval. Once approved, the “Authorization” tab of the this section will show the screen shown below.

SimSage b2b

General Settings Configuration Webhooks Authorization App Diagnostics

Submit and manage your app's admin authorization

Submit app for authorization for access to the Enterprise	Last Activity	Enablement Status	Authorization Status
	February 23, 2022	Enabled	Authorized

[Review and Submit](#)

You must re-submit your app if any changes are made after submission

Back to My Account

Once the application is “Enabled” you can start crawling Box using SimSage.

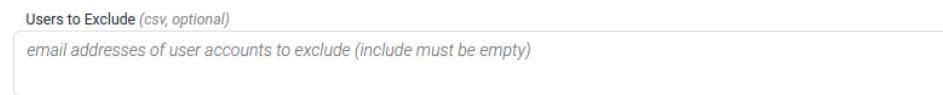
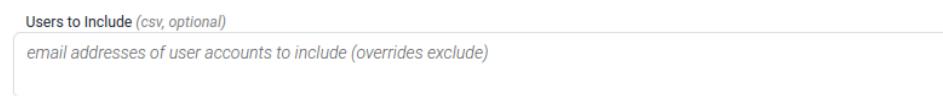
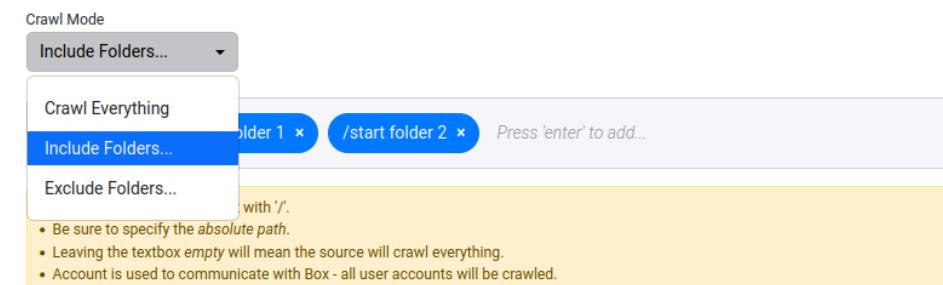
Folder Filtering

Once you have successfully set-up your box account we can begin crawling through specific folders, you have *three* options available to you:

- Include Folders
- Exclude Folders (beginning from root)
- Crawl Everything

 Folders need to be reference by their *absolute path*

To select one of these three options, select from the drop down shown below:



if the option selected is to include or exclude folders, a text box will appear prompting you to specify the *paths* of these folders.



 By default - all *sub-directories* are also resolved when including/excluding folders

 Excluding folders or users can only be done once at source creation time.