



# iManage Crawler Setup

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## Introduction

This is a short guide aimed at showing how to configure iManage to enable the SimSage

This crawler only works with on-premise iManage servers.

## Prerequisites

In order to create the iManage Crawler, we must obtain the following credentials:

- the iManage server name (a fully qualified domain name (aka. FQDN))
- Admin username and password
- Client ID and Secret
- a Library ID
- [optional] Starting folder(s), separated by commas

Server \*

Admin username \*

Admin Password \*

Client ID \*

Client Secret \*

Library ID \*

Event-cursor index to check from

 Now

Start folder (separate folders by comma)  
Leave empty to crawl all folders

- Each folder must be part of the root folder and not contain any sub-folders.
- Each folder name must start with '/'.

Screenshot of the SimSage iManage Crawler page

## Client Secret and ID

To connect to the iManage API from an **on-premises iManage Work Server**, you'll need to create a **Client ID and Secret** using **iManage Control Center** (or via your iManage Work Server configuration, depending on the version). Here's a step-by-step guide tailored to on-prem environments:

### 1. Prerequisites

Before generating a client ID/secret:

- You must have **administrative access** to the iManage Work Server.
- Ensure the **iManage Work Server** is on a version that supports API connectivity (Work 10+ recommended).
- Confirm that **iManage RAVN** and **iManage Work Indexer** are configured if your use case involves search APIs.

### 2. Creating an OAuth Client (Client ID & Secret)

#### Option A: Via Control Center (Work 10)

If your on-prem server has **Control Center**:

1. **Log into Control Center** using an admin account.
2. Navigate to "Applications" → "OAuth Clients".
3. Click "Create OAuth Client".
4. Provide:
  - **Name** and optional **Description**
  - **Redirect URI** (can be `http://localhost` or your app's endpoint)
  - **Scopes** (e.g., `imanage:work`, `imanager:user`, depending on your needs)
  - Optionally, enable `Client Credentials Grant` if you're using service-to-service auth.
5. Click **Save**.
6. The system will display a **Client ID** and **Client Secret** — **save these immediately**, as the secret won't be shown again.

## Option B: Without Control Center

If you don't have Control Center, the process is **manual**:

1. You'll need to configure OAuth directly on your **iManage Work Server** by editing the `authorization.config.json` file or an equivalent configuration file.
2. Restart the iManage services after adding your app configuration.
3. This method may vary depending on your server version — refer to the relevant version's **Administrator Guide**.

### 3. Test Your Credentials

You can test your credentials using:

```
1 curl -X POST https://<your_imanage_server>/auth/token \
2   -d "grant_type=client_credentials" \
3   -d "client_id=YOUR_CLIENT_ID" \
4   -d "client_secret=YOUR_CLIENT_SECRET"
5
```

If successful, you'll get an `access_token` you can use in API calls.

### Notes

- iManage uses **OAuth 2.0** for authentication.
- Ensure your **on-prem server's firewall** allows traffic to/from your application if applicable.
- You may need additional scopes/permissions depending on the API endpoints you intend to use.

## Library ID

An **iManage Library ID** is a unique identifier assigned to a **document library** (also known as a **database**) within the iManage Work system. Libraries in iManage are essentially databases that store documents, metadata, and security information.

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### What Is an iManage Library?

In iManage, a **library** represents:

- A **distinct document repository** (e.g., per region, business unit, or legal entity).
- It includes its own:
  - Document and workspace structures
  - Security configurations
  - Metadata schemas

For example, you might have:

- Library `NY01` for the New York office
- Library `LDN01` for the London office

Each has a **Library ID** like `NY01`, `LDN01`, etc.

### Where to Find the Library ID

#### 1. Using Control Center (Work 10+)

If you're using iManage Work with Control Center:

1. Log into **iManage Control Center**.
2. Go to "**Work Server**" or "**Databases**".
3. You'll see a list of **libraries**.
  - The **Library ID** will typically appear in a column labeled "**Database ID**", "**Library ID**", or similar.
  - It's usually an acronym or short code (e.g., `DOCS`, `NY01`).

## 2. Using iManage Work Server Configuration

If you're managing Work Server manually:

- Check the **Work Server configuration file** (often named `imanageworkserver.config.json`, `db.config.xml`, etc.).
- The libraries will be defined there with **names and IDs**.

## 3. From the iManage API

If you're connecting via API, you can retrieve libraries with:

```
1 GET /api/v2/libraries
2 Authorization: Bearer <your_access_token>
```

This will return a list of libraries the authenticated user has access to, including IDs and metadata.

## What It's Used For

You'll need the **Library ID** in many API contexts:

- Searching for documents
- Creating workspaces
- Accessing folders or metadata
- Filtering documents in a specific repository

Example API usage:

```
1 GET /api/v2/libraries/NY01/documents
```