



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.

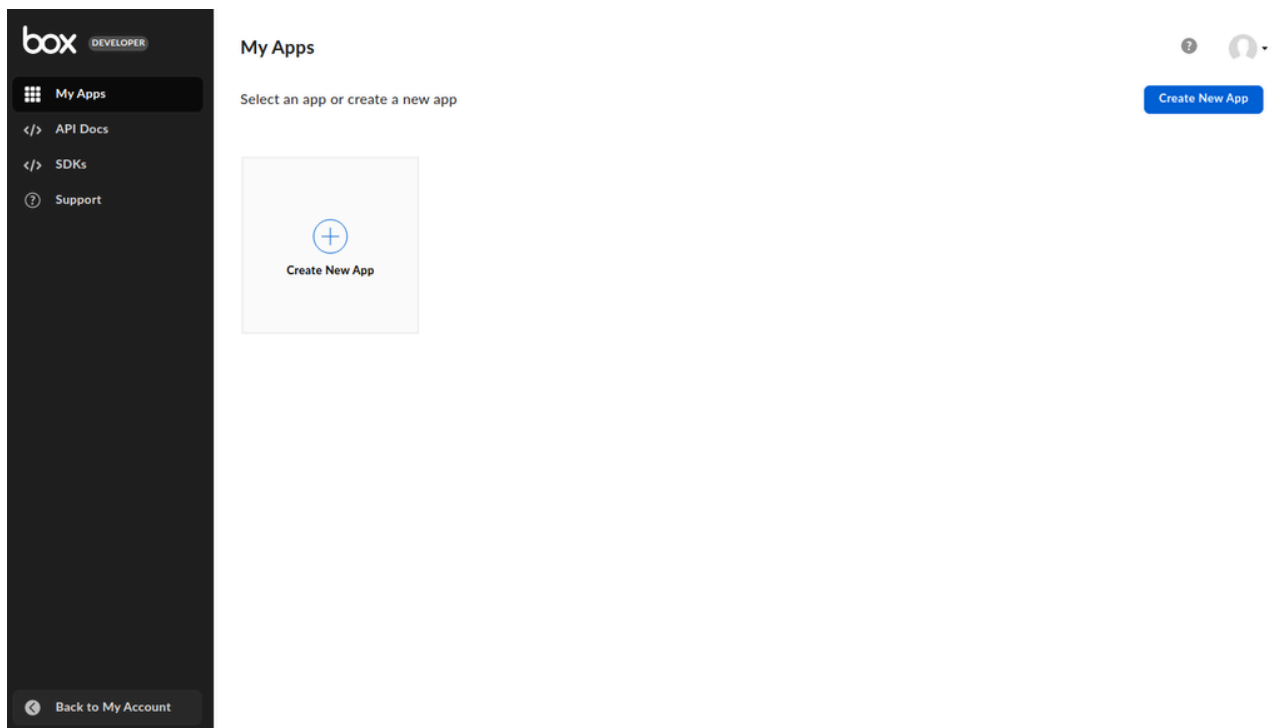
Prerequisites

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

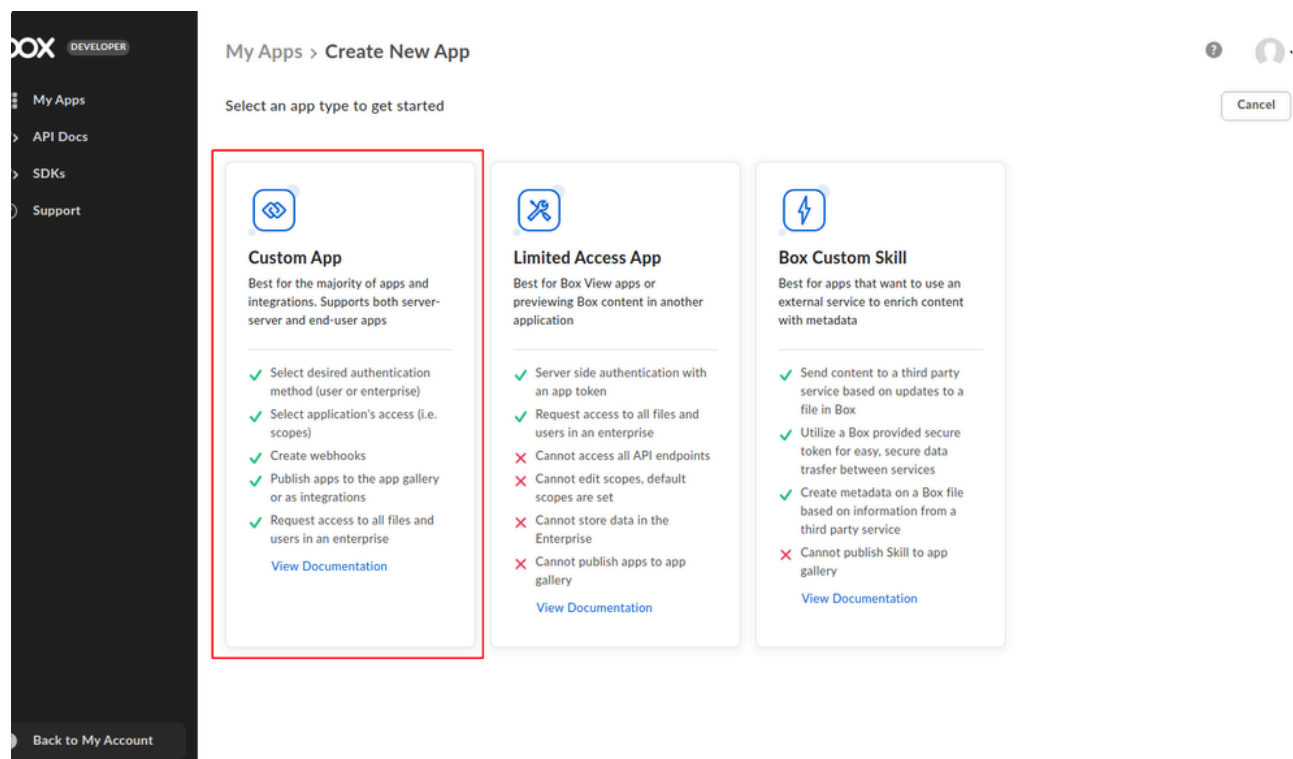
- Client ID
- Client Secret
- Enterprise ID
- Folder List

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”

Custom App

Select an authentication method and enter a name for your app. You can change the name later in General Settings.

Authentication Method

☐ Server Authentication (with JWT)

- Best for building integrations or apps with external collaborators - [Learn More](#)
- The app authenticates using a JSON Web Token. Requires a public/private key-pair for added security.

☐ User Authentication (OAuth 2.0)

- Best for building mobile or web apps - [Learn More](#)
- Users must authenticate with their Box login.

☒ Server Authentication (Client Credentials Grant)

- Best for scripting and back office integrations - [Learn More](#)
- The app authenticates using Client ID and Client Secret.

App Name

SimSage b2b

By clicking 'Create App', you agree to the terms of the [Box Developer Agreement](#) and the [Box Privacy Policy](#).

Cancel

Create App

Select “Server Authentication (Client Credentials Grant)”

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

Click “Create app”

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General Settings

Configuration

Webhooks

Authorization

App Diagnostics

Request app authorization, manage collaborators

App Info

Update general information about your app.

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

Collaborated developers (max 15) will have the ability to access, edit, and delete the app.

rock@simsage.nz

Admin

Add New Collaborator

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

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Manage authentication methods and app permissions

Save Changes

Authentication Method

Choose how your app will authenticate to the Box APIs. [Learn more.](#)

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

Test your access or write scripts as your user with a Developer Token. A developer token allows you to use the Box API to access your personal Box account only. This token is valid for 60 minutes. To access the entire Enterprise, request for Enterprise access and submit your app for authorization.

Developer Token

18JPK29COPY

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

Credentials for using OAuth 2.0 as your Authentication type.

Client ID

jhh4b1COPY

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”.

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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-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

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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

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.

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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.](#)

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Allowed Origins (optional)

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

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.

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Submit and manage your app's admin authorization

Submit app for authorization for access to the Enterprise

Submit your app for approval based on the access requested. Your admin will receive an email of the request. You will receive an email once the request is approved or denied. [Learn more about app authorization](#)

[Review and Submit](#)

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


Last Activity	Enablement Status	Authorization Status
February 23, 2022	● Enabled	Authorized

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

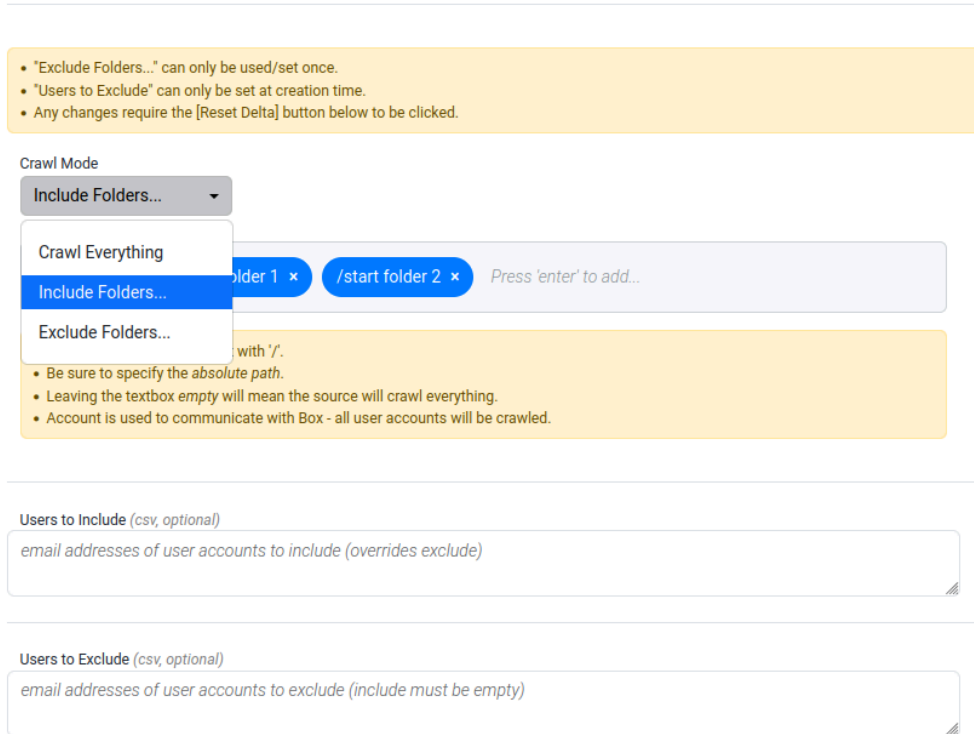
Folder Filtering

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



• "Exclude Folders..." can only be used/set once.
• "Users to Exclude" can only be set at creation time.
• Any changes require the [Reset Delta] button below to be clicked.

Crawl Mode

Include Folders...

Crawl Everything

Include Folders...

Exclude Folders...

Be sure to specify the *absolute path*.
Leaving the textbox *empty* will mean the source will crawl everything.
Account is used to communicate with Box - all user accounts will be crawled.

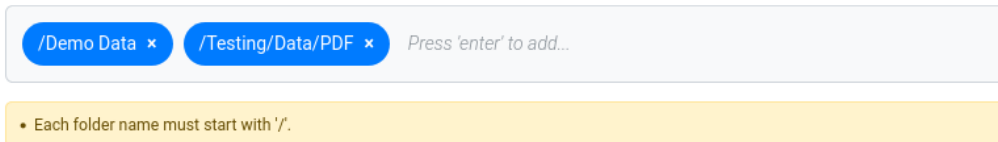
Users to Include (csv, optional)

email addresses of user accounts to include (overrides exclude)

Users to Exclude (csv, optional)


email addresses of user accounts to exclude (include must be empty)


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



/Demo Data x /Testing/Data/PDF x Press 'enter' to add...

Each folder name must start with '/'.

 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.