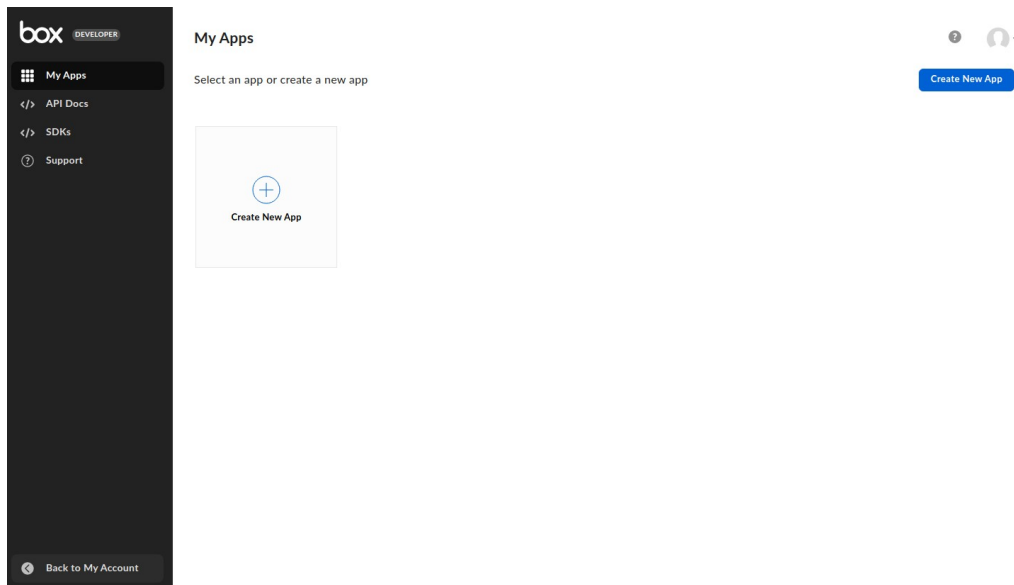


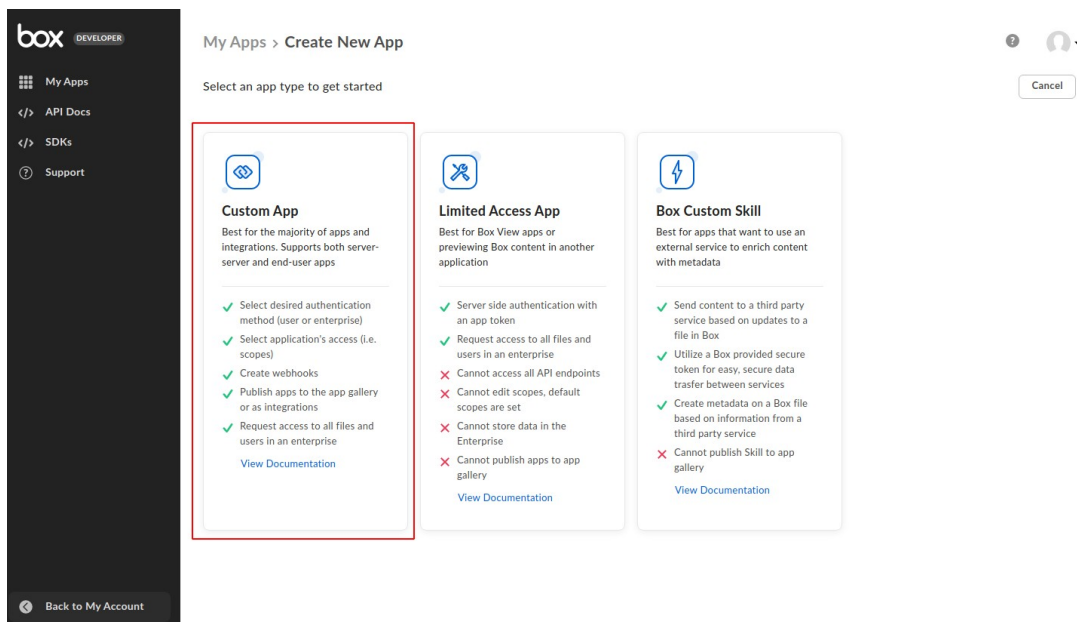
Box Setup Guide

This document will walk you through the steps required to setup and gather the necessary details required to set up a Box crawler on SimSage for a business account.

1. Sign into your Box account and navigate to <https://app.box.com/developers/console>
2. Navigate to “My apps”
3. Select “Create new app”

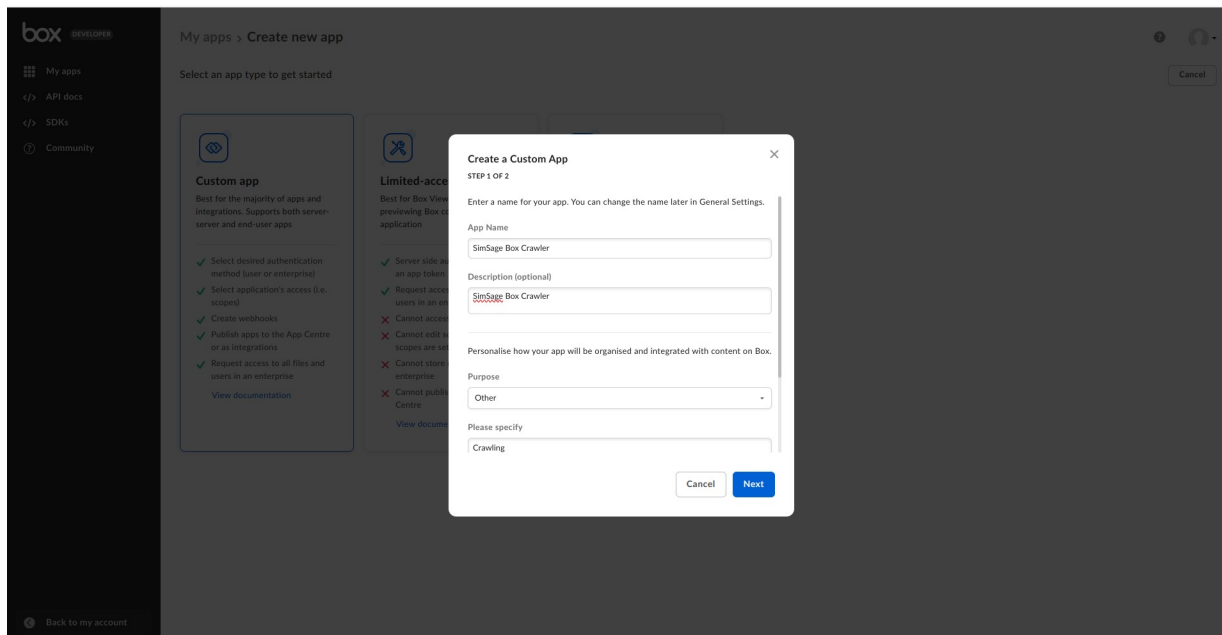


4. Next, select “Custom app”.

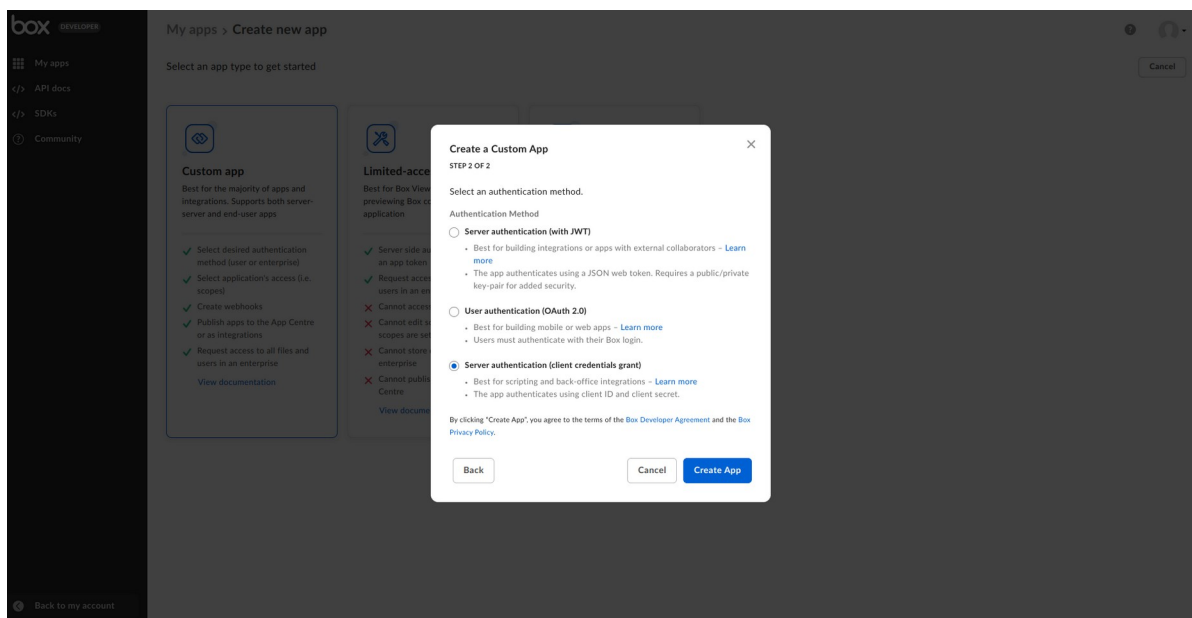


5. Populate page one of the form. In our example we have used the following details;

App Name: “SimSage Box Crawler”
Description: “SimSage Box Crawler”
Purpose: “Other”
Please specify: “crawling”
Who is building this application: “Partner”
Please specify: “SimSage UK LTD”

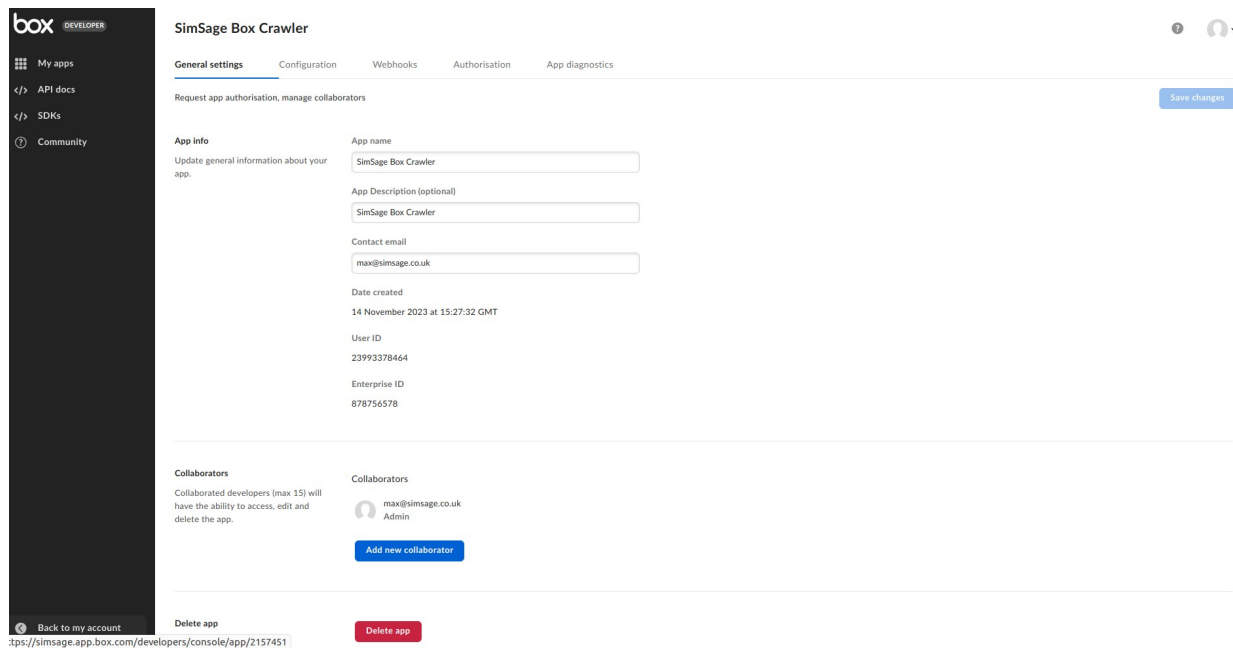


6. Next, select “Server authentication (client credentials grant)”
7. Click “Create App”



8. You will then be directed to the settings page of your new app.

9. Make note of the Enterprise ID (SimSage will require this ID later)



SimSage Box Crawler

General settings | Configuration | Webhooks | Authorisation | App diagnostics

Request app authorisation, manage collaborators

App info
Update general information about your app.

App name: SimSage Box Crawler

App Description (optional): SimSage Box Crawler

Contact email: max@simsage.co.uk

Date created: 14 November 2023 at 15:27:32 GMT

User ID: 23993378464

Enterprise ID: 878756578

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

Collaborators: max@simsage.co.uk Admin

[Add new collaborator](#)

[Delete app](#)

[Back to my account](#)

tps://simsage.app.box.com/developers/console/app/2157451

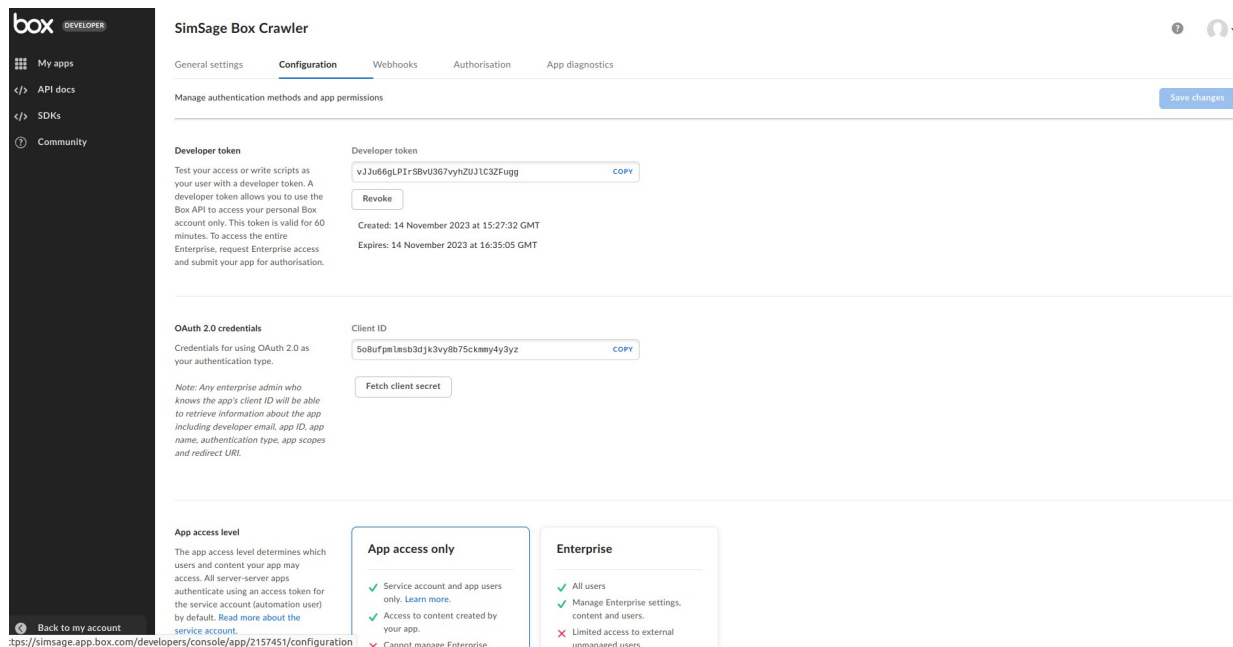
10. Navigate to the “Configuration” tab

11. Scroll to find the “Oauth 2.0 credentials” section

12. Copy the Client ID (SimSage will require this ID later)

13. Click “Fetch client secret” and copy the secret ID too (SimSage will require this ID later)

NB: You may be required to set up 2-factor authentication to receive the secret.



SimSage Box Crawler

General settings | **Configuration** | Webhooks | Authorisation | App diagnostics

Manage authentication methods and app permissions

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 Enterprise access and submit your app for authorisation.

Developer token: vJJu66gLP1rSBvU367vyhZUJ1C3ZFugg

[Revoke](#)

Created: 14 November 2023 at 15:27:32 GMT

Expires: 14 November 2023 at 16:35:05 GMT

OAuth 2.0 credentials
Credentials for using OAuth 2.0 as your authentication type.

Note: Any enterprise admin who knows the app's client ID will be able to retrieve information about the app including developer email, app ID, app name, authentication type, app scopes and redirect URL.

Client ID: So8ufpm1msb3djk3vy8b75ckmmy4y3yz

[Fetch client secret](#)

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

Enterprise

- ✓ All users
- ✓ Manage Enterprise settings, content and users.
- ✗ Limited access to external unmanaged users.

[Back to my account](#)

tps://simsage.app.box.com/developers/console/app/2157451/configuration

14. Scroll further to find the “App access level” section

15. Select “Enterprise”

The screenshot shows the 'Configuration' tab in the Box Developer console for an application named 'SimSage Box Crawler'. The 'App access level' section is active, showing two options: 'App access only' and 'Enterprise'. The 'Enterprise' option is selected, indicated by a blue border and a checkmark. Below this, the 'Application scopes' section is visible, with 'Read all files and folders stored in Box' and 'Write all files and folders stored in Box' selected. The 'Content actions' section shows 'Read all files and folders stored in Box' and 'Write all files and folders stored in Box' selected. The 'Administrative actions' section shows 'Manage users' and 'Manage groups' selected. A 'Save changes' button is located at the top right of the configuration area.

SimSage Box Crawler

General settings **Configuration** Webhooks Authorisation App diagnostics

Manage authentication methods and app permissions [Save changes](#)

name, authentication type, app scopes and redirect URL.

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.

Enterprise

- ✓ 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.](#)

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
- ☒ Manage groups
- ☐ Manage retention policies

[Back to my account](#)

16. Next scroll to the “Advanced features” section

17. Ensure both “Make API calls using the as-user header” and “Generate user access tokens” are selected

The screenshot shows the 'Configuration' tab in the Box Developer console for an application named 'SimSage Box Crawler'. The 'Advanced features' section is active, showing two options: 'Make API calls using the as-user header' and 'Generate user access tokens'. Both options are selected, indicated by checkmarks. Below this, the 'Developer actions' section is visible, with 'Manage webhooks', 'Enable integrations', and 'Manage Box Relay' selected. The 'Allowed origins (optional)' section shows a text input field containing 'https://mydomain.com, https://mydomain2.com'. A 'Save changes' button is located at the top right of the configuration area.

SimSage Box Crawler

General settings **Configuration** Webhooks Authorisation App diagnostics

Manage authentication methods and app permissions [Save changes](#)

name, authentication type, app scopes and redirect URL.

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.

Enterprise

- ✓ All users
- ✓ Manage Enterprise settings, content and users.
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Application scopes
The app scopes determine which endpoints and resources your app can successfully call. [Learn more.](#)

Content actions

- ☒ Read all files and folders stored in Box
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- ☒ 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
- ☒ Manage groups
- ☐ Manage retention policies

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

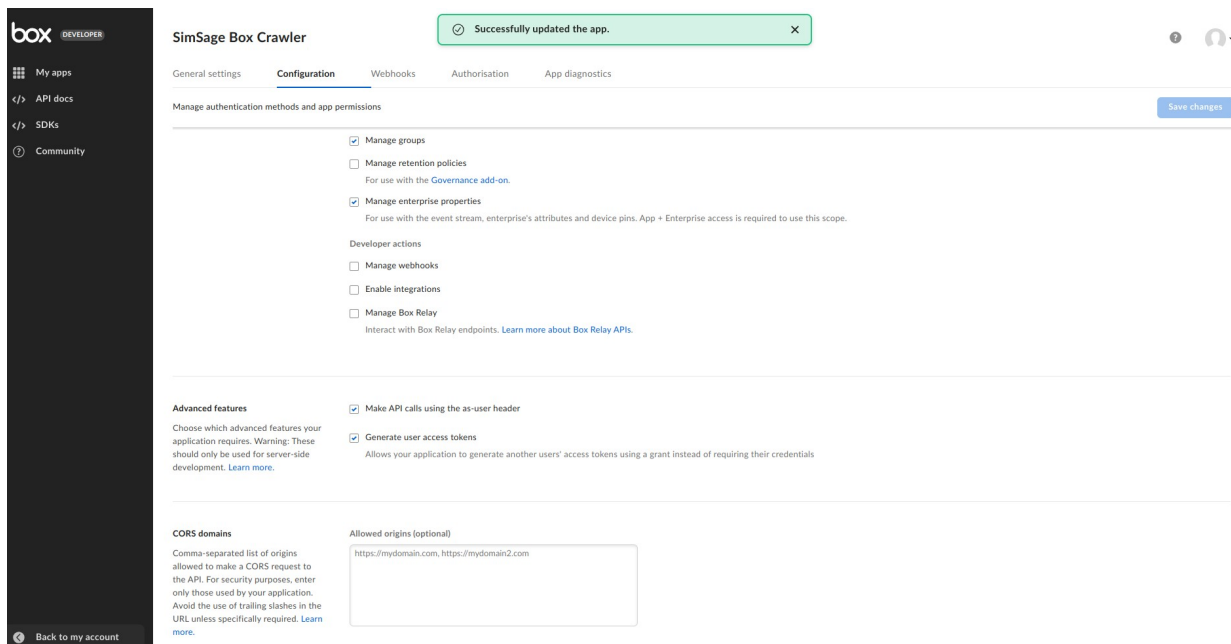
Developer actions

- ☐ Manage webhooks
- ☐ Enable integrations
- ☐ Manage Box Relay
Interact with Box Relay endpoints. [Learn more about Box Relay APIs.](#)

Allowed origins (optional)
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.](#)

[Back to my account](#)

18. Click “Save Changes” (You should see a “Successfully updated the app” message).



The screenshot shows the 'SimSage Box Crawler' configuration page in the Box Developer portal. A green success message at the top states 'Successfully updated the app.' The 'Configuration' tab is active, displaying settings for authentication, developer actions, advanced features, and CORS domains. A 'Save changes' button is visible in the top right corner of the configuration area.

SimSage Box Crawler

General settings | **Configuration** | Webhooks | Authorisation | App diagnostics

Manage authentication methods and app permissions

- ☒ Manage groups
- ☐ Manage retention policies
For use with the [Governance add-on](#).
- ☒ Manage enterprise properties
For use with the event stream, enterprise's attributes and device pins. App + Enterprise access is required to use this scope.

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

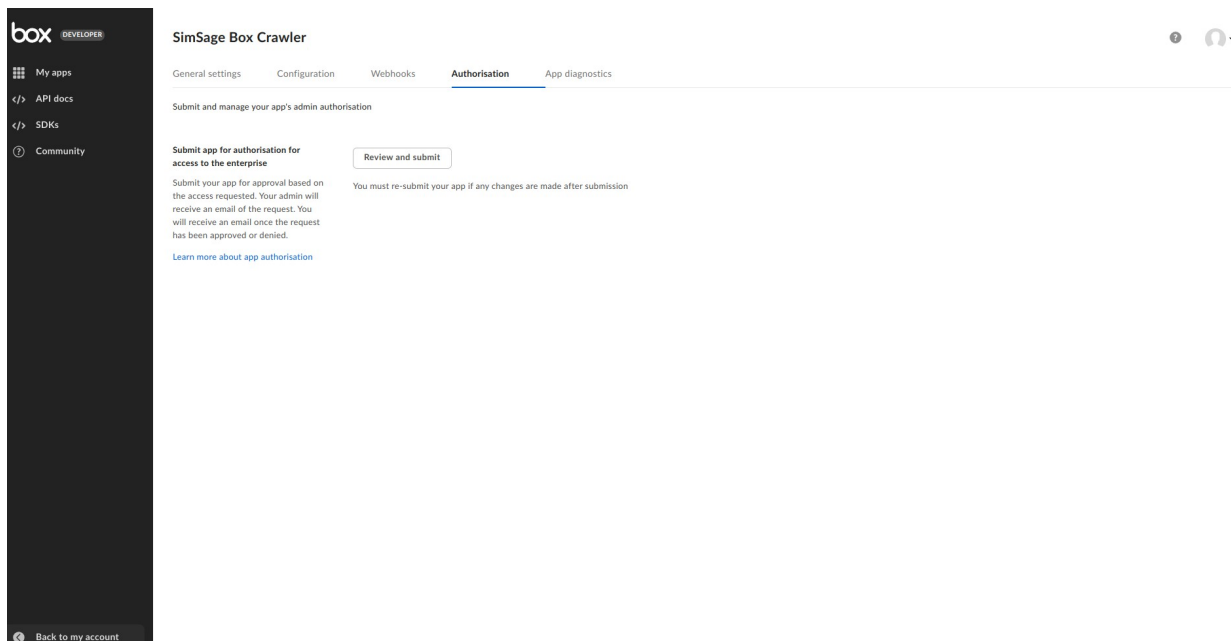
Comma-separated list of origins allowed to make a CORS request to the API. For security purposes, enter only those used by your application. Avoid the use of trailing slashes in the URL unless specifically required. [Learn more](#).

Allowed origins (optional)

[Back to my account](#)

19. Once the app has been saved the box administrator for your account will receive an email asking them to approve the new application.

20. If you make any changes to the configuration you can navigate to the “Authorisation” tab and re-submit your app for approval



The screenshot shows the 'SimSage Box Crawler' Authorisation page in the Box Developer portal. The 'Authorisation' tab is active, displaying instructions for submitting the app for approval and a 'Review and submit' button.

SimSage Box Crawler

General settings | Configuration | Webhooks | **Authorisation** | App diagnostics

Submit and manage your app's admin authorisation

Submit app for authorisation for access to the enterprise

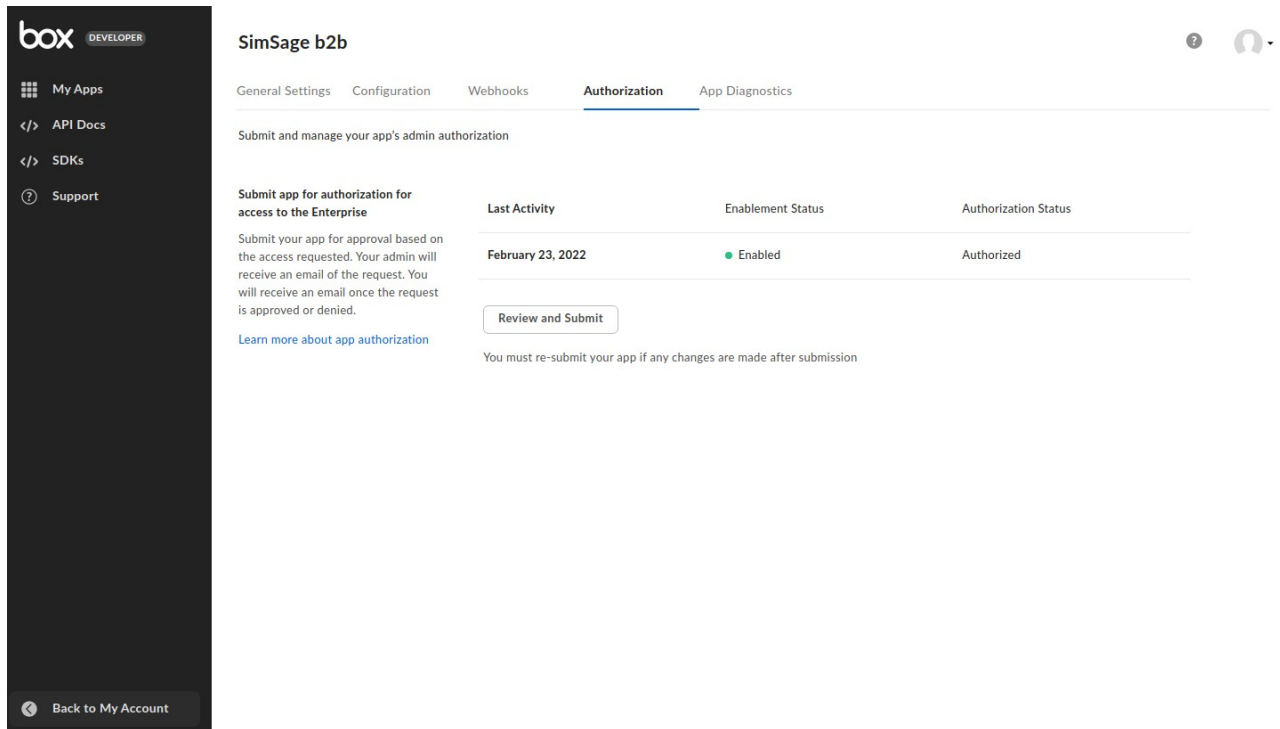
[Review and submit](#)

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 has been approved or denied.

[Learn more about app authorisation](#)

[Back to my account](#)

21. Once approved the “Authorisation” tab will show as below



The screenshot shows the Box Developer portal interface. On the left is a dark sidebar with the 'box' logo and 'DEVELOPER' label. The sidebar menu includes 'My Apps', 'API Docs', 'SDKs', and 'Support'. At the bottom of the sidebar is a 'Back to My Account' link. The main content area is titled 'SimSage b2b' and has a top navigation bar with tabs: 'General Settings', 'Configuration', 'Webhooks', 'Authorization' (which is selected), and 'App Diagnostics'. Below the tabs, there is a heading 'Submit and manage your app's admin authorization'. The main content is divided into two columns. The left column contains a section titled 'Submit app for authorization for access to the Enterprise' with a paragraph explaining the submission process and a link to 'Learn more about app authorization'. The right column contains a table with three columns: 'Last Activity', 'Enablement Status', and 'Authorization Status'. The table has one row with the values 'February 23, 2022', 'Enabled', and 'Authorized'. Below the table is a 'Review and Submit' button and a note: 'You must re-submit your app if any changes are made after submission'.

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

22. Once the application is enabled you can jump over to SimSage and set up your new source.