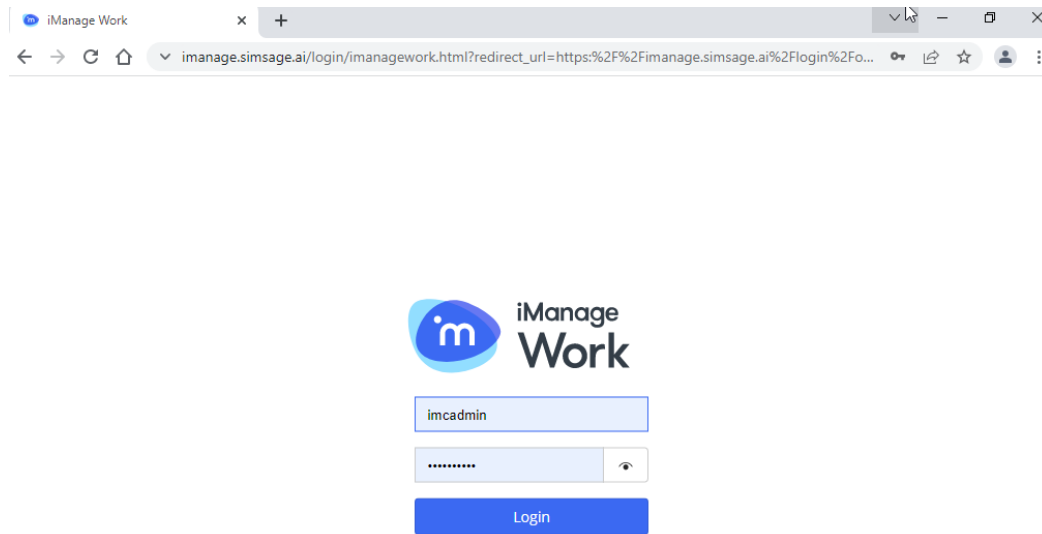
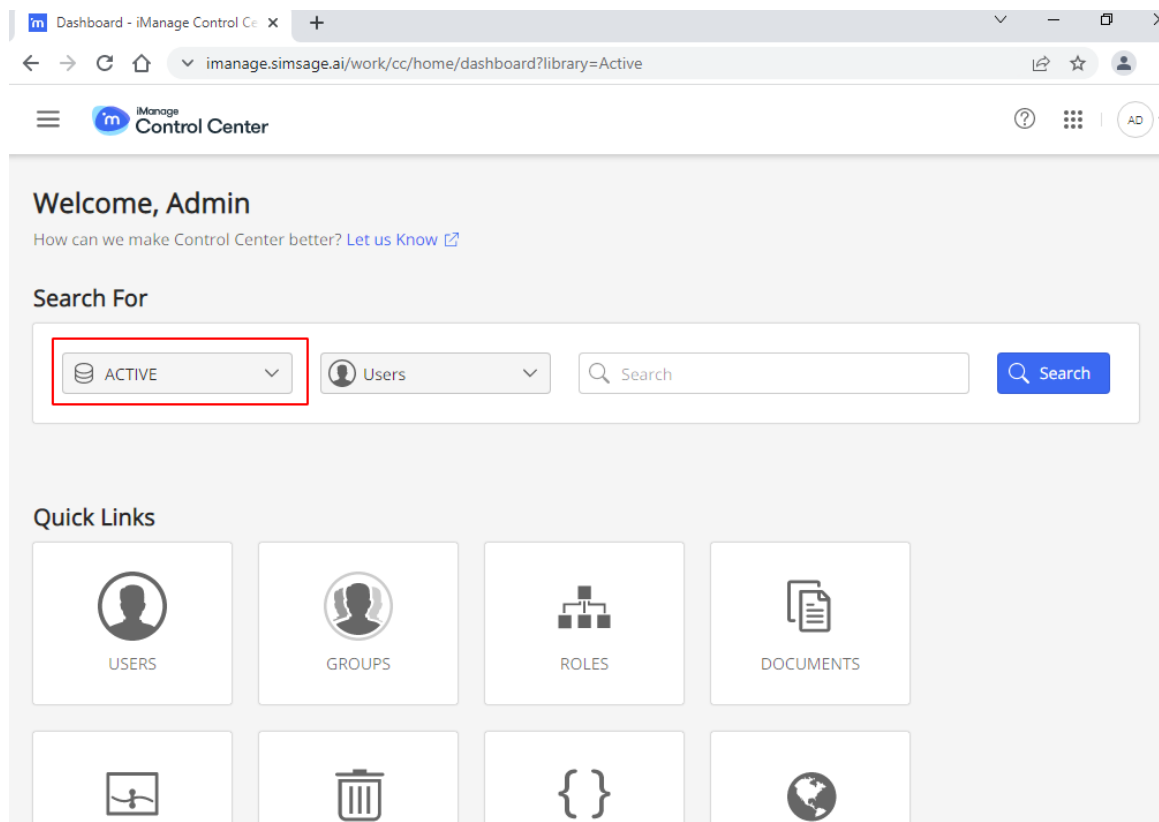


This is a short guide aimed at showing how to configure iManage to enable the SimSage iManage crawler.

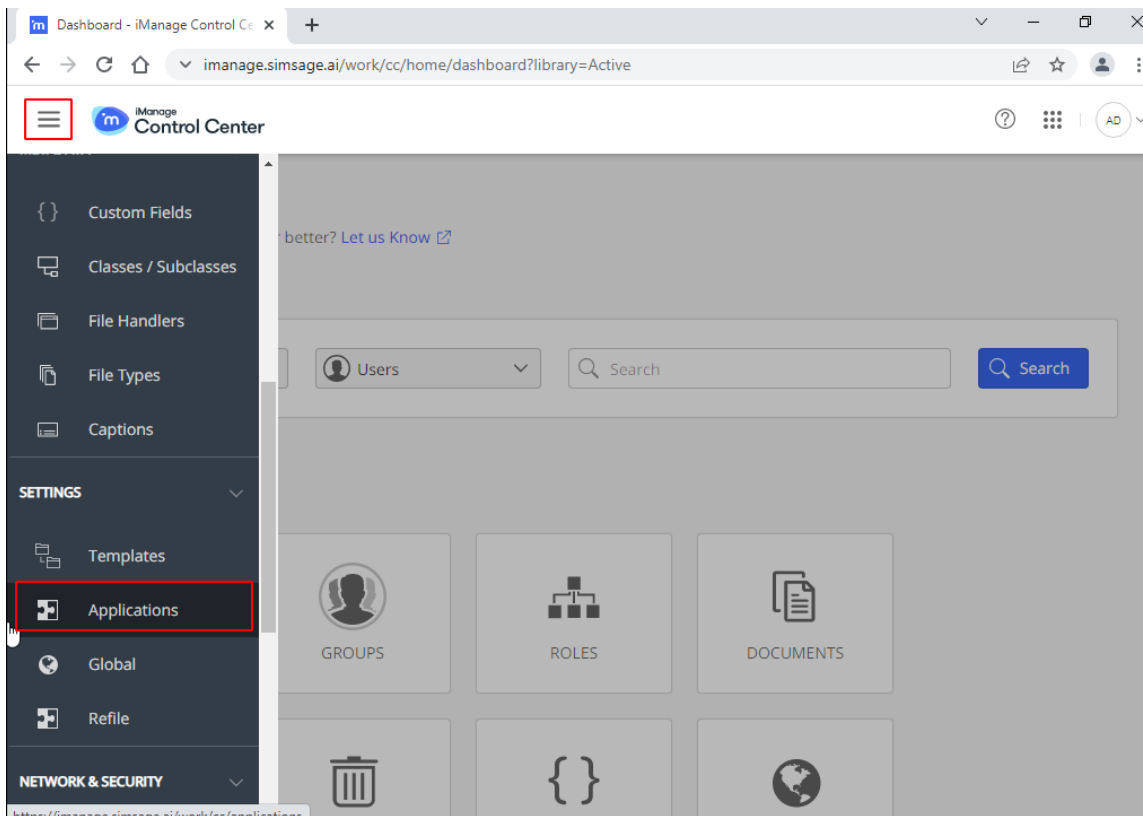
Sign-in to your iManage server by visiting (here server is the FQDN of your iManage server.
<https://<server>/work/cc>



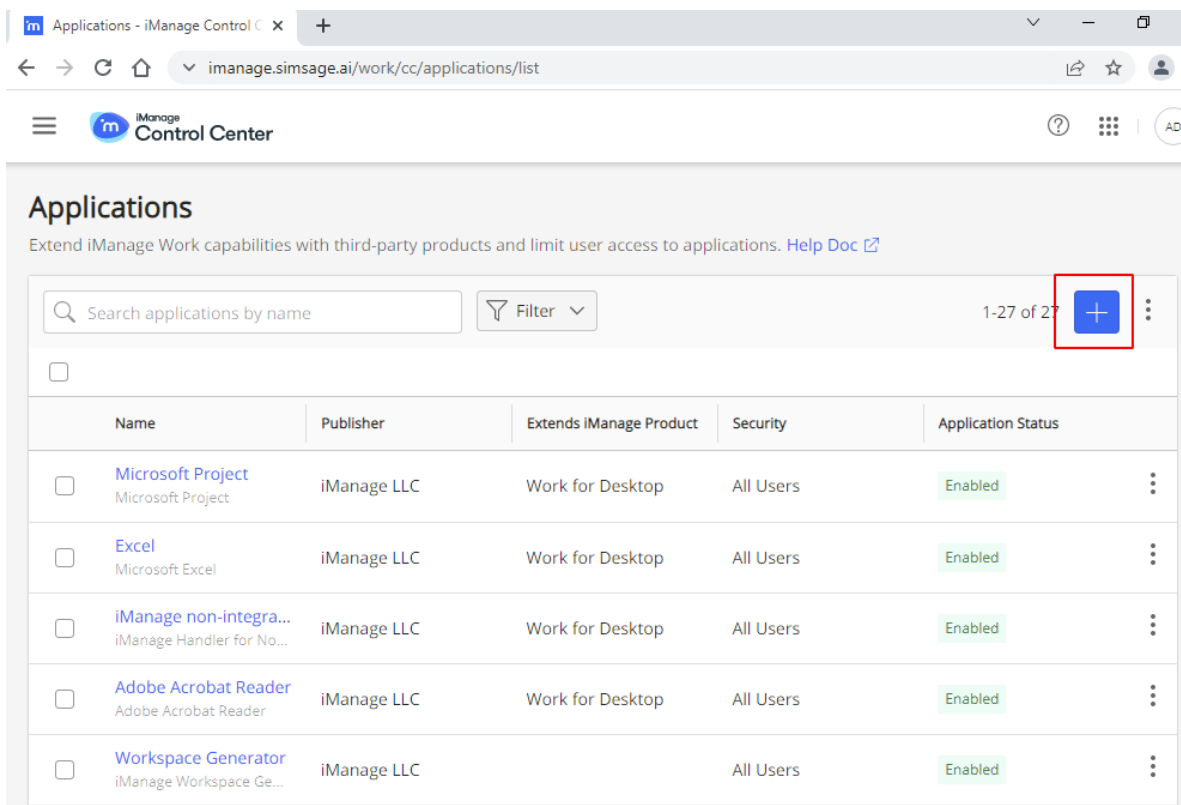
Sign in as an administrator. You will see the following screen.



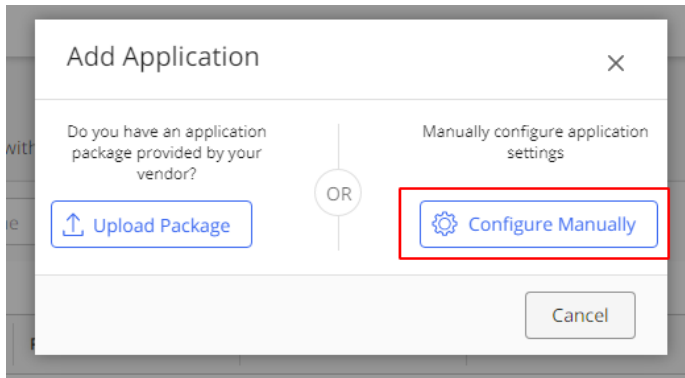
The item outlined in RED is your Library ID, write this name down. In our example the library ID is “ACTIVE”.



Click the hamburger menu (outlined in RED) at the left-top to open up the side menu, and scroll down to the “Applications” section. Click “Applications”.



Add a new application by clicking the large + icon located in the right-hand corner of the control center as shown.



Click “Configure Manually” on the dialog that pops up after clicking the + icon.

The image shows the "Add Application" dialog box, specifically the "Configuration" step (indicated by a blue circle with the number 1). A progress bar at the top shows four steps: Configuration, Authentication, Access, and Review. The "Configuration" step is active. Below the progress bar, there are five input fields: "Name*" (containing "SimSage"), "Description" (containing "SimSage crawler"), "API Key*" (containing "1231241"), "API Secret*" (containing "121235912939"), and "Publisher" (containing "SimSage"). Below the "API Secret" field is a link labeled "Auto-Generate". At the bottom of the dialog, there are two buttons: "Authentication >" (highlighted in blue) and "Cancel".

The “Add Application” dialog pops-up. Set:

Name to “SimSage”

Description to “SimSage crawler”

API Key: any series of numbers and/or letters to generate a secure key

API secret: any series of numbers and/or letters to generate a secure secret

Publisher to “SimSage”

Write down the API key and API secret, as SimSage will be needing these.

Click the “Authentication >” button to continue.

Add Application ✕

Configuration **2 Authentication** 3 Access 4 Review

iManage Work Authentication Required? ☒ Yes

Application Type ☒ Web ☐ Native

Client Type ⓘ ☒ Public ☐ Confidential

Redirect URL * ⓘ
[+ Add Another URL](#)

Client Secret ⓘ
[Generate](#)

[< Configuration](#) [Access >](#) [Cancel](#)

Set the Redirect URL to “<https://simsage.ai/>”,

Add Application ✕

Configuration **2 Authentication** 3 Access 4 Review

Client Type ⓘ ☒ Public ☐ Confidential

Redirect URL * ⓘ
[+ Add Another URL](#)

Client Secret ⓘ
[Generate](#)

Client Secret Expires ⓘ ☒ Never ☐

Allow Refresh Token ⓘ ☒ No

Access Token Expiry ⓘ mins

[< Configuration](#) [Access >](#) [Cancel](#)

Scroll down and ensure that the “Client Secret Expires” is set to “Never”, and click the “Access >” button to continue.

Add Application

Configuration Authentication Access Review

Allow access to ☒ All Users ☐ Custom

< Authentication Review > Cancel

Make sure “All Users” is set and click the “Review >” button to continue.

Click the “Finish” button to create the application and enable SimSage access.

Add Application

Configuration Authentication Access Review

Enabled application will be available immediately for users that you specified in step "Access".

Enable application? ☒ Yes

| Configuration | |
|---------------|-----------------|
| Name | SimSage |
| Description | SimSage crawler |
| API Key | 1231241 |
| API Secret | 121235912939 |
| Publisher | SimSage |

< Access Finish Cancel