

[MS-EDCSOM]: eDiscovery Client-Side Object Model Protocol Specification

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Table of Contents

1 Introduction	8
1.1 Glossary	8
1.2 References.....	8
1.2.1 Normative References.....	8
1.2.2 Informative References	9
1.3 Overview	9
1.4 Relationship to Other Protocols.....	9
1.5 Prerequisites/Preconditions	10
1.6 Applicability Statement.....	10
1.7 Versioning and Capability Negotiation.....	10
1.8 Vendor-Extensible Fields.....	10
1.9 Standards Assignments	10
2 Messages.....	11
2.1 Transport.....	11
2.2 Message Syntax	11
2.2.1 Common Exceptions	11
3 Protocol Details	12
3.1 Server Details	12
3.1.1 Abstract Data Model	12
3.1.2 Timers	12
3.1.3 Initialization	12
3.1.4 Higher-Layer Triggered Events.....	12
3.1.5 Message Processing Events and Sequencing Rules.....	12
3.1.5.1 Microsoft.Office.RecordsManagement.InformationPolicy.ProjectPolicy	12
3.1.5.1.1 Properties	13
3.1.5.1.1.1 Scalar Properties	13
3.1.5.1.1.2 ObjectPath Properties.....	13
3.1.5.1.2 Methods.....	13
3.1.5.1.2.1 Scalar Methods.....	13
3.1.5.1.2.1.1 DoesProjectHavePolicy.....	13
3.1.5.1.2.1.2 GetProjectCloseDate.....	13
3.1.5.1.2.1.3 GetProjectExpirationDate	14
3.1.5.1.2.1.4 IsProjectClosed	14
3.1.5.1.2.2 ObjectPath Methods.....	14
3.1.5.2 Microsoft.Office.Server.Discovery.Case.....	15
3.1.5.2.1 Properties	15
3.1.5.2.1.1 Scalar Properties	15
3.1.5.2.1.1.1 CaseClosed	15
3.1.5.2.1.1.2 ClosedDate.....	15
3.1.5.2.1.1.3 ConsoleId.....	15
3.1.5.2.1.1.4 Id	15
3.1.5.2.1.2 ObjectPath Properties.....	15
3.1.5.2.1.2.1 Custodians	15
3.1.5.2.1.2.2 Exports	16
3.1.5.2.1.2.3 SavedSearches	16
3.1.5.2.1.2.4 SourceGroups.....	16
3.1.5.2.1.2.5 Sources	16
3.1.5.2.2 Methods.....	16

3.1.5.2.2.1	Scalar Methods.....	16
3.1.5.2.2.1.1	CloseCase	16
3.1.5.2.2.2	ObjectPath Methods.....	16
3.1.5.2.2.2.1	CreateCustodian	16
3.1.5.2.2.2.2	CreateExport	17
3.1.5.2.2.2.3	CreateLocation.....	17
3.1.5.2.2.2.4	CreateMailbox.....	17
3.1.5.2.2.2.5	CreateSavedSearch	17
3.1.5.2.2.2.6	CreateSourceGroup	17
3.1.5.2.2.2.7	CSOM Constructor.....	17
3.1.5.3	Microsoft.Office.Server.Discovery.Custodian.....	18
3.1.5.3.1	Properties	18
3.1.5.3.1.1	Scalar Properties	18
3.1.5.3.1.1.1	Id	18
3.1.5.3.1.1.2	LoginName.....	18
3.1.5.3.1.1.3	Name	18
3.1.5.3.1.1.4	Notes	18
3.1.5.3.1.2	ObjectPath Properties.....	18
3.1.5.3.2	Methods.....	18
3.1.5.3.2.1	Scalar Methods.....	18
3.1.5.3.2.1.1	Update	18
3.1.5.3.2.2	ObjectPath Methods.....	19
3.1.5.3.2.2.1	CSOM Constructor.....	19
3.1.5.4	Microsoft.Office.Server.Discovery.CustodianCollection	19
3.1.5.4.1	Properties	19
3.1.5.4.1.1	Scalar Properties	19
3.1.5.4.1.2	ObjectPath Properties.....	19
3.1.5.4.2	Methods.....	19
3.1.5.4.2.1	Scalar Methods.....	19
3.1.5.4.2.2	ObjectPath Methods.....	19
3.1.5.5	Microsoft.Office.Server.Discovery.Export	19
3.1.5.5.1	Properties	20
3.1.5.5.1.1	Scalar Properties	20
3.1.5.5.1.1.1	DownloadLink	20
3.1.5.5.1.1.2	EstimatedItems	20
3.1.5.5.1.1.3	EstimatedSize.....	20
3.1.5.5.1.1.4	ExportStructure	20
3.1.5.5.1.1.5	IncludeVersions	20
3.1.5.5.1.1.6	Name	20
3.1.5.5.1.1.7	ResultLink	20
3.1.5.5.1.1.8	RightsManagement.....	21
3.1.5.5.1.1.9	Status	21
3.1.5.5.1.1.10	IncludeNonSearchableItems	21
3.1.5.5.1.2	ObjectPath Properties.....	21
3.1.5.5.2	Methods.....	21
3.1.5.5.2.1	Scalar Methods.....	21
3.1.5.5.2.1.1	AddSearch	21
3.1.5.5.2.1.2	DeleteExport	21
3.1.5.5.2.1.3	Update	22
3.1.5.5.2.1.4	GetExportContent	22
3.1.5.5.2.2	ObjectPath Methods.....	24
3.1.5.5.2.2.1	CSOM Constructor.....	24
3.1.5.6	Microsoft.Office.Server.Discovery.ExportCollection	24

3.1.5.6.1	Properties	24
3.1.5.6.1.1	Scalar Properties	24
3.1.5.6.1.2	ObjectPath Properties.....	24
3.1.5.6.2	Methods.....	24
3.1.5.6.2.1	Scalar Methods.....	24
3.1.5.6.2.2	ObjectPath Methods.....	24
3.1.5.7	Microsoft.Office.Server.Discovery.ExportStatus	25
3.1.5.7.1	Field Values.....	25
3.1.5.7.1.1	Started.....	25
3.1.5.7.1.2	Complete.....	25
3.1.5.7.1.3	Failed.....	25
3.1.5.7.1.4	NotStarted.....	25
3.1.5.8	Microsoft.Office.Server.Discovery.SavedSearch	25
3.1.5.8.1	Properties	25
3.1.5.8.1.1	Scalar Properties	25
3.1.5.8.1.1.1	DateEndFilter.....	25
3.1.5.8.1.1.2	DateStartFilter.....	26
3.1.5.8.1.1.3	EXFilters	26
3.1.5.8.1.1.4	EXRefinements	26
3.1.5.8.1.1.5	ItemCount.....	26
3.1.5.8.1.1.6	Name	26
3.1.5.8.1.1.7	Query	26
3.1.5.8.1.1.8	SourceGroupIds.....	26
3.1.5.8.1.1.9	SourceIds	27
3.1.5.8.1.1.10	SourceManagement.....	27
3.1.5.8.1.1.11	SPFilters.....	27
3.1.5.8.1.1.12	SPRefinements.....	27
3.1.5.8.1.1.13	TotalSize	27
3.1.5.8.1.2	ObjectPath Properties.....	27
3.1.5.8.2	Methods.....	27
3.1.5.8.2.1	Scalar Methods.....	27
3.1.5.8.2.1.1	DeleteSavedSearch	27
3.1.5.8.2.1.2	GetEffectiveQuery	28
3.1.5.8.2.1.3	Update	28
3.1.5.8.2.1.4	UpdateStatistics.....	28
3.1.5.8.2.2	ObjectPath Methods.....	28
3.1.5.8.2.2.1	Copy	28
3.1.5.9	Microsoft.Office.Server.Discovery.SavedSearchCollection.....	28
3.1.5.9.1	Properties	28
3.1.5.9.1.1	Scalar Properties	28
3.1.5.9.1.2	ObjectPath Properties.....	28
3.1.5.9.2	Methods.....	29
3.1.5.9.2.1	Scalar Methods.....	29
3.1.5.9.2.2	ObjectPath Methods.....	29
3.1.5.10	Microsoft.Office.Server.Discovery.Source	29
3.1.5.10.1	Properties.....	29
3.1.5.10.1.1	Scalar Properties	29
3.1.5.10.1.1.1	ContainerId	29
3.1.5.10.1.1.2	CrawlErrorPercent	29
3.1.5.10.1.1.3	DisplayId.....	29
3.1.5.10.1.1.4	FederationId	29
3.1.5.10.1.1.5	IsLocation	30
3.1.5.10.1.1.6	IsMailbox	30

3.1.5.10.1.1.7	ItemErrors.....	30
3.1.5.10.1.1.8	LastIndexedTime.....	30
3.1.5.10.1.1.9	Name.....	30
3.1.5.10.1.1.10	PreservationHistory.....	30
3.1.5.10.1.1.11	PreservationStatus	30
3.1.5.10.1.1.12	SharePointSiteErrors.....	31
3.1.5.10.1.1.13	SourceId	31
3.1.5.10.1.1.14	SourceTypeDisplayName	31
3.1.5.10.1.1.15	WebId.....	31
3.1.5.10.1.2	ObjectPath Properties.....	31
3.1.5.10.1.2.1	Custodians	31
3.1.5.10.2	Methods.....	31
3.1.5.10.2.1	Scalar Methods.....	31
3.1.5.10.2.1.1	AddCustodian	31
3.1.5.10.2.1.2	DeleteSource	32
3.1.5.10.2.1.3	Update.....	32
3.1.5.10.2.1.4	UpdateErrorInfo	32
3.1.5.10.2.2	ObjectPath Methods	32
3.1.5.10.2.2.1	GetSource	32
3.1.5.10.2.2.2	CSOM Constructor	32
3.1.5.11	Microsoft.Office.Server.Discovery.SourceCollection	33
3.1.5.11.1	Properties.....	33
3.1.5.11.1.1	Scalar Properties	33
3.1.5.11.1.2	ObjectPath Properties.....	33
3.1.5.11.2	Methods.....	33
3.1.5.11.2.1	Scalar Methods.....	33
3.1.5.11.2.2	ObjectPath Methods	33
3.1.5.12	Microsoft.Office.Server.Discovery.SourceGroup.....	33
3.1.5.12.1	Properties.....	33
3.1.5.12.1.1	Scalar Properties	33
3.1.5.12.1.1.1	DateEndFilter.....	33
3.1.5.12.1.1.2	DateStartFilter	33
3.1.5.12.1.1.3	HoldId	34
3.1.5.12.1.1.4	Items.....	34
3.1.5.12.1.1.5	Name.....	34
3.1.5.12.1.1.6	Preserve.....	34
3.1.5.12.1.1.7	Query	34
3.1.5.12.1.1.8	Size.....	34
3.1.5.12.1.2	ObjectPath Properties.....	35
3.1.5.12.1.2.1	Sources.....	35
3.1.5.12.2	Methods.....	35
3.1.5.12.2.1	Scalar Methods.....	35
3.1.5.12.2.1.1	AddSource.....	35
3.1.5.12.2.1.2	ClearSources	35
3.1.5.12.2.1.3	DeleteSourceGroup	35
3.1.5.12.2.1.4	GetEffectiveQuery	35
3.1.5.12.2.1.5	RemoveSource.....	35
3.1.5.12.2.1.6	Update.....	36
3.1.5.12.2.1.7	UpdateStatistics	36
3.1.5.12.2.2	ObjectPath Methods	36
3.1.5.13	Microsoft.Office.Server.Discovery.SourceGroupCollection	36
3.1.5.13.1	Properties.....	36
3.1.5.13.1.1	Scalar Properties	36

3.1.5.13.1.2	ObjectPath Properties.....	36
3.1.5.13.2	Methods.....	36
3.1.5.13.2.1	Scalar Methods.....	36
3.1.5.13.2.2	ObjectPath Methods.....	36
3.1.5.14	Microsoft.Office.Server.Discovery.SourceManagementType	37
3.1.5.14.1	Field Values.....	37
3.1.5.14.1.1	AllContent.....	37
3.1.5.14.1.2	SourceGroup.....	37
3.1.5.14.1.3	Source.....	37
3.1.5.15	Microsoft.Office.Server.Discovery.SourceType	37
3.1.5.15.1	Field Values.....	37
3.1.5.15.1.1	Exchange.....	37
3.1.5.15.1.2	SharePoint.....	37
3.1.5.15.1.3	FileShare.....	37
3.1.6	Timer Events	38
3.1.7	Other Local Events	38
4	Protocol Examples.....	39
4.1	Get a Discovery Case	39
4.2	Create a Source.....	40
4.3	Create and Preserve a Discovery Source Group	41
4.4	Create a Query	42
5	Security.....	44
5.1	Security Considerations for Implementers.....	44
5.2	Index of Security Parameters	44
6	Appendix A: Product Behavior.....	45
7	Change Tracking.....	46
8	Index	47

1 Introduction

The eDiscovery Client-Side Object Model Protocol provides types, methods, and properties to enable a protocol client to perform operations to manage **legal holds**.

Sections 1.8, 2, and 3 of this specification are normative and can contain the terms MAY, SHOULD, MUST, MUST NOT, and SHOULD NOT as defined in RFC 2119. Sections 1.5 and 1.9 are also normative but cannot contain those terms. All other sections and examples in this specification are informative.

1.1 Glossary

The following terms are defined in [\[MS-GLOS\]](#):

UncPath

The following terms are defined in [\[MS-OFCGLOS\]](#):

crawl log
CSOM Boolean
CSOM DateTime
CSOM GUID
CSOM Int32
CSOM Int64
CSOM Object
CSOM String
custodian
discovery case
discovery source
Information Rights Management (IRM)
legal hold
list item
policy
query refinement
search query
site
Uniform Resource Locator (URL)
Web site

The following terms are specific to this document:

MAY, SHOULD, MUST, SHOULD NOT, MUST NOT: These terms (in all caps) are used as described in [\[RFC2119\]](#). All statements of optional behavior use either MAY, SHOULD, or SHOULD NOT.

1.2 References

References to Microsoft Open Specifications documentation do not include a publishing year because links are to the latest version of the technical documents, which are updated frequently. References to other documents include a publishing year when one is available.

1.2.1 Normative References

We conduct frequent surveys of the normative references to assure their continued availability. If you have any issue with finding a normative reference, please contact dochelp@microsoft.com. We

will assist you in finding the relevant information. Please check the archive site, <http://msdn2.microsoft.com/en-us/library/E4BD6494-06AD-4aed-9823-445E921C9624>, as an additional source.

[MS-CSOM] Microsoft Corporation, "[SharePoint Client Query Protocol Specification](#)".

[MS-FQL2] Microsoft Corporation, "[Fast Query Language Version 2 Protocol Specification](#)".

[MS-KQL] Microsoft Corporation, "[Keyword Query Language Structure Protocol Specification](#)".

[RFC2119] Bradner, S., "Key words for use in RFCs to Indicate Requirement Levels", BCP 14, RFC 2119, March 1997, <http://www.rfc-editor.org/rfc/rfc2119.txt>

[RFC2616] Fielding, R., Gettys, J., Mogul, J., et al., "Hypertext Transfer Protocol -- HTTP/1.1", RFC 2616, June 1999, <http://www.ietf.org/rfc/rfc2616.txt>

[RFC2818] Rescorla, E., "HTTP Over TLS", RFC 2818, May 2000, <http://www.ietf.org/rfc/rfc2818.txt>

[RFC4627] Crockford, D., "The application/json Media Type for Javascript Object Notation (JSON)", RFC 4627, July 2006, <http://www.ietf.org/rfc/rfc4627.txt>

1.2.2 Informative References

[MS-GLOS] Microsoft Corporation, "[Windows Protocols Master Glossary](#)".

[MS-OFCGLOS] Microsoft Corporation, "[Microsoft Office Master Glossary](#)".

1.3 Overview

This protocol defines types, methods, and properties that a protocol client uses to manage a **discovery case**. For example, the protocol enables a protocol client to retrieve a discovery case from the protocol server, retrieve the associated **discovery sources**, and perform such operations as initiating a legal hold on those discovery sources.

1.4 Relationship to Other Protocols

The eDiscovery Client-Side Object Model protocol is a set of types, properties, and methods that can be accessed by using the SharePoint Client Query protocol as described in [\[MS-CSOM\]](#). This protocol uses JSON as described in [\[RFC4627\]](#) to format data returned to a protocol client. This protocol also uses HTTP, as described in [\[RFC2616\]](#), and HTTPS, as described in [\[RFC2818\]](#). The dependencies for this protocol are shown in the following layering diagram.

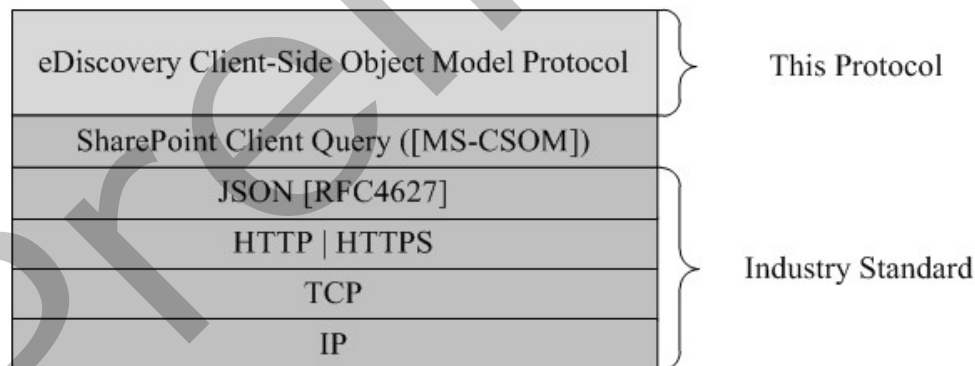


Figure 1: This protocol in relation to other protocols

1.5 Prerequisites/Preconditions

This protocol assumes that authentication has been performed by underlying protocols.

1.6 Applicability Statement

This protocol is optimized to enable a protocol client to specify the exact set of data and operations to perform in a single batch, making it suitable for situations where the connection speed between the protocol client and the protocol server can be slow.

This protocol is not suitable and is inefficient if both the protocol client and protocol server are on the same computer. In this case, the client should use an API that does not require communication over a network.

1.7 Versioning and Capability Negotiation

None.

1.8 Vendor-Extensible Fields

None.

1.9 Standards Assignments

None.

2 Messages

2.1 Transport

Messages are transported by using the SharePoint Client Query Protocol, as specified in [\[MS-CSOM\]](#).

2.2 Message Syntax

None.

2.2.1 Common Exceptions

The protocol server MUST validate the request from the protocol client. When a protocol server processes a CSOM operation in the request, the following table lists common exceptions that could occur when accessing or updating a property or invoking a method.

Error Code	Error Type Name	Condition
- 2147024891	System.UnauthorizedAccessException	The user does not have permission to access a property, update a property, or call a method.

Besides the preceding exceptions and the exceptions that are listed for the specific properties or methods, the protocol server can return other exceptions to the protocol client, for which the protocol client could use the error message for display purpose but could not use the error code or error type to determine the causes of the exception.

Exceptions listed for the specific properties are thrown for both read and write operations, unless otherwise specified.

3 Protocol Details

3.1 Server Details

3.1.1 Abstract Data Model

This section describes a conceptual model of possible data organization that an implementation maintains to participate in this protocol. The described organization is provided to facilitate the explanation of how the protocol behaves. This document does not mandate that implementations adhere to this model as long as their external behavior is consistent with that described in this document.

The protocol server maintains a multiple collections of discovery cases, for example lawsuits for 2005-2010 and lawsuits for 2000-2005.

For each case, the protocol server maintains a list of discovery sources that are applicable to the scope of the discovery case. For example, if a case were about Contoso vs. Fabrikam, an exemplary discovery source might be the email mailbox for the executives of Contoso. Discovery sources can be organized in groups, such as locations associated with a given person, that is **custodian**. The protocol server also maintains internal state about actions that need to be performed for discovery sources, such as when a given discovery source should be placed on legal hold, as well as the status of whether those actions have been performed.

In addition, the protocol server maintains a list of search queries applicable to the discovery sources of a given case, as well as metadata about when those search queries have been exported, that is downloaded.

The protocol server also maintains a directory of valid email mailboxes and **Web sites** that can be used as discovery sources. In addition, the protocol server maintains a set of **policies** that can be associated with the location, as well as state whether the location allows further editing or is in archival (closed).

This protocol shares the abstract data model used by the SharePoint Client Query protocol as described in [\[MS-CSOM\]](#) section 3.1.1 to communicate with the protocol server.

3.1.2 Timers

None.

3.1.3 Initialization

None.

3.1.4 Higher-Layer Triggered Events

None.

3.1.5 Message Processing Events and Sequencing Rules

3.1.5.1 Microsoft.Office.RecordsManagement.InformationPolicy.ProjectPolicy

TypeId: {EC5E0A70-0CC3-408F-A4DC-1BB3495AAC75}

ShortName: Microsoft.Office.RecordsManagement.InformationPolicy.ProjectPolicy

A policy associated with a Web site or email mailbox.

3.1.5.1.1 Properties

3.1.5.1.1.1 Scalar Properties

None.

3.1.5.1.1.2 ObjectPath Properties

None.

3.1.5.1.2 Methods

3.1.5.1.2.1 Scalar Methods

3.1.5.1.2.1.1 DoesProjectHavePolicy

This method is a static CSOM method.

Return Type: **CSOM Boolean**

Checks whether the Web site has an associated policy.

Parameters:

web: The **site (2)**.

Type: Microsoft.SharePoint.Client.Web

It MUST NOT be NULL.

Exceptions:

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	Web is null.

3.1.5.1.2.1.2 GetProjectCloseDate

This method is a static CSOM method.

Return Type: **CSOM DateTime**

Gets the date the Web site was archived (closed). If the Web site is not closed, the protocol server returns an implementation specific default value that is less than 1970.

Parameters:

web: The site (2).

Type: Microsoft.SharePoint.Client.Web

It MUST NOT be NULL.

Exceptions:

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	Web is null.

3.1.5.1.2.1.3 GetProjectExpirationDate

This method is a static CSOM method.

Return Type: CSOM DateTime

Gets the expiration date of the Web site according to its associated policy. If there is no associated expiration date, the protocol server returns an implementation specific default value that is less than 1970.

Parameters:

web: The site (2).

Type: Microsoft.SharePoint.Client.Web

It MUST NOT be NULL.

Exceptions:

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	Web is null.

3.1.5.1.2.1.4 IsProjectClosed

This method is a static CSOM method.

Return Type: CSOM Boolean

Checks whether the Web site is in archival (closed).

Parameters:

web: The site (2).

Type: Microsoft.SharePoint.Client.Web

It MUST NOT be NULL.

Exceptions:

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	Web is null.

3.1.5.1.2.2 ObjectPath Methods

None.

3.1.5.2 Microsoft.Office.Server.Discovery.Case

TypeId: {DF6AC2D8-CD50-4CF4-BC52-F61766F2E005}

ShortName: Microsoft.Office.Server.Discovery.Case

A discovery case.

3.1.5.2.1 Properties

3.1.5.2.1.1 Scalar Properties

3.1.5.2.1.1.1 CaseClosed

Type: CSOM Boolean

Accessibility: Read Only

Specifies whether the discovery case is closed.

3.1.5.2.1.1.2 ClosedDate

Type: CSOM DateTime

Accessibility: Read Only

The date the discovery case was closed. If the discovery case is not closed, the protocol server returns an implementation specific default value that is less than 1970.

3.1.5.2.1.1.3 ConsoleId

Type: CSOM GUID

Accessibility: Read Only

The identifier of the group to which this discovery case belongs.

3.1.5.2.1.1.4 Id

Type: CSOM GUID

Accessibility: Read Only

The identifier of the discovery case.

3.1.5.2.1.2 ObjectPath Properties

3.1.5.2.1.2.1 Custodians

Type: Microsoft.Office.Server.Discovery.CustodianCollection

Accessibility: Read Only

The custodians associated with the discovery case.

3.1.5.2.1.2.2 Exports

Type: Microsoft.Office.Server.Discovery.ExportCollection

Accessibility: Read Only

The exports of **search queries** associated with the discovery case.

3.1.5.2.1.2.3 SavedSearches

Type: Microsoft.Office.Server.Discovery.SavedSearchCollection

Accessibility: Read Only

The search queries associated with the discovery case.

3.1.5.2.1.2.4 SourceGroups

Type: Microsoft.Office.Server.Discovery.SourceGroupCollection

Accessibility: Read Only

The groups of discovery sources associated with the case.

3.1.5.2.1.2.5 Sources

Type: Microsoft.Office.Server.Discovery.SourceCollection

Accessibility: Read Only

The discovery sources associated with the case.

3.1.5.2.2 Methods

3.1.5.2.2.1 Scalar Methods

3.1.5.2.2.1.1 CloseCase

Return Type: None

Performs implementation-specific operations to end (close) the discovery case, such as setting metadata of the date of closure as well as initiating release of legal holds associated with the discovery case.

Parameters: None

3.1.5.2.2.2 ObjectPath Methods

3.1.5.2.2.2.1 CreateCustodian

Return Type: Microsoft.Office.Server.Discovery.Custodian

Creates a new custodian. The new custodian is not added until the

Microsoft.Office.Server.Discovery.Custodian Update method is called (section [3.1.5.3.2.1.1](#)).

Parameters: None

3.1.5.2.2.2.2 CreateExport

Return Type: Microsoft.Office.Server.Discovery.Export

Creates a new export. The new export is not added until the **Microsoft.Office.Server.Discovery.Export Update** method is called (section [3.1.5.5.2.1.3](#)).

Parameters: None

3.1.5.2.2.2.3 CreateLocation

Return Type: Microsoft.Office.Server.Discovery.Source

Creates a new discovery source that for a Web site. The new discovery source is not added until the **Microsoft.Office.Server.Discovery.Source Update** method is called (section [3.1.5.10.2.1.3](#)).

Parameters: None

3.1.5.2.2.2.4 CreateMailbox

Return Type: Microsoft.Office.Server.Discovery.Source

Creates a new discovery source that for an email mailbox. The new discovery source is not added until the **Microsoft.Office.Server.Discovery.Source Update** method is called (section [3.1.5.10.2.1.3](#)).

Parameters: None

3.1.5.2.2.2.5 CreateSavedSearch

Return Type: Microsoft.Office.Server.Discovery.SavedSearch

Creates a new search query. The new search query is not added until the **Microsoft.Office.Server.Discovery.SavedSearch Update** method is called (section [3.1.5.8.2.1.3](#)).

Parameters: None

3.1.5.2.2.2.6 CreateSourceGroup

Return Type: Microsoft.Office.Server.Discovery.SourceGroup

Creates a new group of discovery sources. The new group is not added until the **Microsoft.Office.Server.Discovery.SourceGroup Update** method is called (section [3.1.5.12.2.1.6](#)).

Parameters: None

3.1.5.2.2.2.7 CSOM Constructor

Constructs a discovery case **CSOM Object**.

Parameters:

web: The site (2) that represents a discovery case.

Type: Microsoft.SharePoint.Client.Web

3.1.5.3 Microsoft.Office.Server.Discovery.Custodian

TypeId: {F90F468A-0422-4CB7-9796-5B4F8717D727}

ShortName: Microsoft.Office.Server.Discovery.Custodian

A custodian associated with a discovery case.

3.1.5.3.1 Properties

3.1.5.3.1.1 Scalar Properties

3.1.5.3.1.1.1 Id

Type: CSOM Int32

Accessibility: Read Only

The identifier of the custodian.

3.1.5.3.1.1.2 LoginName

Type: CSOM String

Accessibility: Read/Write

The login name of the custodian.

3.1.5.3.1.1.3 Name

Type: CSOM String

Accessibility: Read/Write

The name of the custodian.

3.1.5.3.1.1.4 Notes

Type: CSOM String

Accessibility: Read/Write

The description of the custodian.

3.1.5.3.1.2 ObjectPath Properties

None.

3.1.5.3.2 Methods

3.1.5.3.2.1 Scalar Methods

3.1.5.3.2.1.1 Update

Return Type: None

Updates or adds the custodian in a discovery case.

Parameters: None

3.1.5.3.2.2 ObjectPath Methods

3.1.5.3.2.2.1 CSOM Constructor

Constructs a custodian CSOM Object.

Parameters:

item: The **list item** that represents a custodian.

Type: Microsoft.SharePoint.Client.ListItem

3.1.5.4 Microsoft.Office.Server.Discovery.CustodianCollection

TypeId: {6B5101B9-64B2-4DFF-A753-270C6996C75B}

ShortName: Microsoft.Office.Server.Discovery.CustodianCollection

A collection of custodians.

3.1.5.4.1 Properties

3.1.5.4.1.1 Scalar Properties

None.

3.1.5.4.1.2 ObjectPath Properties

None.

3.1.5.4.2 Methods

3.1.5.4.2.1 Scalar Methods

None.

3.1.5.4.2.2 ObjectPath Methods

None.

3.1.5.5 Microsoft.Office.Server.Discovery.Export

TypeId: {A0C1EA79-9E20-4F8E-96B7-B18956A5CFFB}

ShortName: Microsoft.Office.Server.Discovery.Export

An export associated with a discovery case.

3.1.5.5.1 Properties

3.1.5.5.1.1 Scalar Properties

3.1.5.5.1.1.1 DownloadLink

Type: CSOM String

Accessibility: Read Only

A URL from which users can download the items.

3.1.5.5.1.1.2 EstimatedItems

Type: CSOM Int32

Accessibility: Read Only

The estimated number of items in the export.

3.1.5.5.1.1.3 EstimatedSize

Type: CSOM Int32

Accessibility: Read Only

The estimated size of the export.

3.1.5.5.1.1.4 ExportStructure

Type: CSOM Boolean

Accessibility: Read Only

Whether to remove duplicated content from the export.

3.1.5.5.1.1.5 IncludeVersions

Type: CSOM Boolean

Accessibility: Read Only

Whether historical versions of content are included in the export.

3.1.5.5.1.1.6 Name

Type: CSOM String

Accessibility: Read/Write

The name of the export.

3.1.5.5.1.1.7 ResultLink

Type: CSOM String

Accessibility: Read Only

A URL from which users can download a report of which items are included in the export.

3.1.5.5.1.1.8 RightsManagement

Type: CSOM Boolean

Accessibility: Read Only

Whether to remove **Information Rights Management (IRM)** encryption from content in the export.

3.1.5.5.1.1.9 Status

Type: Microsoft.Office.Server.Discovery.ExportStatus

Accessibility: Read/Write

The status of the export; which MUST be a value as specified in section [3.1.5.7](#).

3.1.5.5.1.1.10 IncludeNonSearchableItems

Type: CSOM Boolean

Accessibility: Read Only

Whether to include content that cannot be found by the implementation's search functionality in the export.

3.1.5.5.1.2 ObjectPath Properties

None.

3.1.5.5.2 Methods

3.1.5.5.2.1 Scalar Methods

3.1.5.5.2.1.1 AddSearch

Return Type: None

Adds the search query to the export.

Parameters:

search: The search query.

Type: Microsoft.Office.Server.Discovery.SavedSearch

3.1.5.5.2.1.2 DeleteExport

Return Type: None

Deletes the export.

Parameters: None

3.1.5.5.2.1.3 Update

Return Type: None

Updates or adds the export in a discovery case.

Parameters: None

3.1.5.5.2.1.4 GetExportContent

Return Type: CSOM String

Returns the export configuration, which MUST conform to the following schema:

```
<?xml version="1.0" encoding="utf-8"?>
<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"
  xmlns:xsi="http://schemas.microsoft.com/Discovery/ExportConfigSchema"
  targetNamespace="http://schemas.microsoft.com/Discovery/ExportConfigSchema"
  elementFormDefault="qualified"
>
  <xs:element name="Export">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="Metadata" minOccurs="1" maxOccurs="1" type="xsi:metadata"/>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
  <xs:complexType name="metadata">
    <xs:sequence>
      <xs:element name="CaseName" type="xs:string" minOccurs="1" maxOccurs="1" />
      <xs:element name="CaseId" type="xs:string" minOccurs="1" maxOccurs="1" />
      <xs:element name="CaseURL" type="xs:string" minOccurs="1" maxOccurs="1" />
      <xs:element name="ExportURL" type="xs:string" minOccurs="1" maxOccurs="1" />
      <xs:element name="ExportName" type="xs:string" minOccurs="1" maxOccurs="1" />
      <xs:element name="ExportId" type="xs:string" minOccurs="1" maxOccurs="1" />
      <xs:element name="RemoveDuplicates" type="xs:boolean" minOccurs="1" maxOccurs="1" />
    </xs:sequence>
  </xs:complexType>
  <xs:element name="RemoveRms" type="xs:boolean" minOccurs="1" maxOccurs="1" />
  <xs:element name="IncludeVersions" type="xs:boolean" minOccurs="1" maxOccurs="1" />
  <xs:element name="EstimatedItems" type="xs:int" minOccurs="1" maxOccurs="1" />
  <xs:element name="EstimatedSize" type="xs:unsignedLong" minOccurs="1"
maxOccurs="1" />
  </xs:sequence>
</xs:complexType>
<xs:complexType name="sources">
  <xs:sequence>
    <xs:element name="Source" type="xsi:source" minOccurs="0" maxOccurs="unbounded"
/>
  </xs:sequence>
</xs:complexType>
<xs:complexType name="source">
  <xs:sequence>
    <xs:element name="Id" type="xs:string" minOccurs="1" maxOccurs="1" />
  </xs:sequence>
</xs:complexType>
```

```

        <xs:element name="Name" type="xs:string" minOccurs="1" maxOccurs="1" />
        <xs:element name="ServerSourceId" type="xs:string" minOccurs="1" maxOccurs="1" />
        <xs:element name="SourceFilter" type="xs:string" minOccurs="1" maxOccurs="1" />
        <xs:element name="Type" type="xs:string" minOccurs="1" maxOccurs="1" />
        <xs:element name="Endpoint" type="xs:string" minOccurs="0" maxOccurs="1" />
        <xs:element name="Custodians" type="xsi:custodians" minOccurs="1" maxOccurs="1"
    />
    </xs:sequence>
</xs:complexType>
<xs:complexType name="custodians">
    <xs:sequence>
        <xs:element name="Custodian" type="xsi:custodian" minOccurs="0"
maxOccurs="unbounded" />
    </xs:sequence>
</xs:complexType>
<xs:complexType name="custodian">
    <xs:sequence>
        <xs:element name="Name" type="xs:string" minOccurs="1" maxOccurs="1" />
        <xs:element name="Id" type="xs:int" minOccurs="1" maxOccurs="1" />
    </xs:sequence>
</xs:complexType>
</xs:schema>

```

The elements are defined as follows:

- **Metadata:** Metadata associated with the export.
 - **CaseName:** The name of the discovery case.
 - **CaseId:** The identifier of the discovery case.
 - **CaseUrl:** The **URL** of the discovery case.
 - **ExportUrl:** The URL of the export.
 - **ExportName:** The name of the export.
 - **ExportId:** The identifier of the export.
 - **RemoveDuplicates:** Whether duplicate content should be removed from the content.
 - **RemoveRms:** Whether Information Rights Management (IRM) encryption should be removed from the exported content.
 - **IncludeVersions:** Whether versions of content should be included in the export.
 - **EstimatedItems:** The estimated number of items in the export.
 - **EstimatedSize:** The estimated size of the content to be downloaded.
- **Sources:** The discovery sources associated with the export.
 - **Id:** The identifier of the discovery source.
 - **Name:** The name of the discovery source.
 - **ServerSourceId:** The identifier of the discovery source.

- **SourceFilter:** A search query associated with the discovery source.
- **Type:** The type of discovery source.
- **Endpoint:** The URL of the discovery source.
- **Custodians:** The custodians associated with the discovery source.
 - **Name:** The name of the custodian.
 - **Id:** The identifier of the custodian.

Parameters: None

3.1.5.5.2.2 ObjectPath Methods

3.1.5.5.2.2.1 CSOM Constructor

Constructs a discovery export CSOM Object.

Parameters:

item: The list item that represents a discovery export.

Type: Microsoft.SharePoint.Client.ListItem

3.1.5.6 Microsoft.Office.Server.Discovery.ExportCollection

TypeId: {7BFE67B2-B9C9-4171-88D7-A17852CAB2EB}

ShortName: Microsoft.Office.Server.Discovery.ExportCollection

A collection of exports.

3.1.5.6.1 Properties

3.1.5.6.1.1 Scalar Properties

None.

3.1.5.6.1.2 ObjectPath Properties

None.

3.1.5.6.2 Methods

3.1.5.6.2.1 Scalar Methods

None.

3.1.5.6.2.2 ObjectPath Methods

None.

3.1.5.7 Microsoft.Office.Server.Discovery.ExportStatus

ShortName: Microsoft.Office.Server.Discovery.ExportStatus

Flag: false

The status of an export.

3.1.5.7.1 Field Values

3.1.5.7.1.1 Started

Value: 1

Specifies that the export has started.

3.1.5.7.1.2 Complete

Value: 2

Specifies that the export is complete.

3.1.5.7.1.3 Failed

Value: 3

Specifies that the export failed.

3.1.5.7.1.4 NotStarted

Value: 0

Specifies that the export has not yet started.

3.1.5.8 Microsoft.Office.Server.Discovery.SavedSearch

TypeId: {73FAB145-0B45-4DE8-B27F-4CDD9339E61F}

ShortName: Microsoft.Office.Server.Discovery.SavedSearch

A search query.

3.1.5.8.1 Properties

3.1.5.8.1.1 Scalar Properties

3.1.5.8.1.1.1 DateEndFilter

Type: CSOM DateTime

Accessibility: Read/Write

An end date filter to associate with the search query.

3.1.5.8.1.1.2 DateStartFilter

Type: CSOM DateTime

Accessibility: Read/Write

An start date filter to associate with the search query.

3.1.5.8.1.1.3 EXFilters

Type: CSOM String

Accessibility: Read Only

A search query that applies to the discovery sources that are email mailboxes, which MUST conform to the syntax specified in [\[MS-KQL\]](#).

3.1.5.8.1.1.4 EXRefinements

Type: CSOM String

Accessibility: Read/Write

A **query refinement** that applies to the discovery sources that are email mailboxes, which MUST conform to the syntax specified in [\[MS-FQL2\]](#).

3.1.5.8.1.1.5 ItemCount

Type: **CSOM Int64**

Accessibility: Read/Write

The estimated number of items that match the search query.

3.1.5.8.1.1.6 Name

Type: CSOM String

Accessibility: Read/Write

The name of the search query.

3.1.5.8.1.1.7 Query

Type: CSOM String

Accessibility: Read/Write

The search query, which MUST conform to the syntax specified in [\[MS-KQL\]](#).

3.1.5.8.1.1.8 SourceGroupIds

Type: CSOM Array

Accessibility: Read Only

The identifiers of one or more groups of discovery sources associated with the search query.

3.1.5.8.1.1.9 SourceIds

Type: CSOM Array

Accessibility: Read Only

The identifiers of specific discovery sources associated with the search query.

3.1.5.8.1.1.10 SourceManagement

Type: Microsoft.Office.Server.Discovery.SourceManagementType

Accessibility: Read/Write

Specifies the type of source management associated with the search query.

3.1.5.8.1.1.11 SPFilters

Type: CSOM String

Accessibility: Read Only

A search query that applies to the discovery sources that are Web sites, which MUST conform to the syntax specified in [\[MS-KQL\]](#).

3.1.5.8.1.1.12 SPRefinements

Type: CSOM String

Accessibility: Read/Write

A query refinement that applies to the discovery sources that are Web sites, which MUST conform to the syntax specified in [\[MS-FQL2\]](#).

3.1.5.8.1.1.13 TotalSize

Type: CSOM Int64

Accessibility: Read/Write

The estimated size of the items that match the search query.

3.1.5.8.1.2 ObjectPath Properties

None.

3.1.5.8.2 Methods

3.1.5.8.2.1 Scalar Methods

3.1.5.8.2.1.1 DeleteSavedSearch

Return Type: None

Deletes the search query.

Parameters: None

3.1.5.8.2.1.2 GetEffectiveQuery

Return Type: CSOM String

Gets an implementation specific search query that finds all content from the discovery sources associated with the search query.

Parameters: None

3.1.5.8.2.1.3 Update

Return Type: None

Updates or adds the search query.

Parameters: None

3.1.5.8.2.1.4 UpdateStatistics

Return Type: None

Updates the estimated number and size of items that match the search query.

Parameters: None

3.1.5.8.2.2 ObjectPath Methods

3.1.5.8.2.2.1 Copy

Return Type: Microsoft.Office.Server.Discovery.SavedSearch

Copies the saved search, assigning it a unique item identifier.

Parameters: None

3.1.5.9 Microsoft.Office.Server.Discovery.SavedSearchCollection

TypeId: {01090900-B1B6-4980-A1DE-47B1A6839E3E}

ShortName: Microsoft.Office.Server.Discovery.SavedSearchCollection

A collection of search queries.

3.1.5.9.1 Properties

3.1.5.9.1.1 Scalar Properties

None.

3.1.5.9.1.2 ObjectPath Properties

None.

3.1.5.9.2 Methods

3.1.5.9.2.1 Scalar Methods

None.

3.1.5.9.2.2 ObjectPath Methods

None.

3.1.5.10 Microsoft.Office.Server.Discovery.Source

TypeId: {98B0FEBE-0B9D-448A-9B3D-84C16EEEE3FC}

ShortName: Microsoft.Office.Server.Discovery.Source

A discovery source.

3.1.5.10.1 Properties

3.1.5.10.1.1 Scalar Properties

3.1.5.10.1.1.1 ContainerId

Type: CSOM String

Accessibility: Read/Write

The identifier of location for the discovery source.

3.1.5.10.1.1.2 CrawlErrorPercent

Type: CSOM String

Accessibility: Read Only

The percentage of content that cannot be found by the implementation's search functionality.

3.1.5.10.1.1.3 DisplayId

Type: CSOM String

Accessibility: Read/Write

The display name of the discovery source.

3.1.5.10.1.1.4 FederationId

Type: CSOM GUID

Accessibility: Read/Write

The identifier of the system that contains the location for the discovery source.

3.1.5.10.1.1.5 IsLocation

Type: CSOM Boolean

Accessibility: Read Only

Whether the discovery source is a Web site.

3.1.5.10.1.1.6 IsMailbox

Type: CSOM Boolean

Accessibility: Read Only

Whether the discovery source is an email mailbox.

3.1.5.10.1.1.7 ItemErrors

Type: CSOM String

Accessibility: Read Only

Errors from the **crawl log** for items contained in the location associated with the discovery source.

3.1.5.10.1.1.8 LastIndexedTime

Type: CSOM DateTime

Accessibility: Read Only

Specifies the time when the location associated with the discovery source was processed by the implementation's search functionality. If the location has never been processed, this is an implementation specific default value that is less than 1970.

3.1.5.10.1.1.9 Name

Type: CSOM String

Accessibility: Read/Write

The name of the discovery source.

3.1.5.10.1.1.10 PreservationHistory

Type: CSOM String

Accessibility: Read Only

A history of actions that have been performed on the discovery source in human-readable form, for example, the history of when the discovery source was placed on legal hold.

3.1.5.10.1.1.11 PreservationStatus

Type: CSOM String

Accessibility: Read Only

The status of the discovery source, that is, whether it is on legal hold.

3.1.5.10.1.1.12 SharePointSiteErrors

Type: CSOM String

Accessibility: Read Only

Errors from the crawl log for the Web site associated with the discovery source.

3.1.5.10.1.1.13 SourceId

Type: CSOM GUID

Accessibility: Read Only

The identifier of the discovery source.

3.1.5.10.1.1.14 SourceTypeDisplayName

Type: CSOM String

Accessibility: Read Only

The type of the discovery source.

3.1.5.10.1.1.15 WebId

Type: CSOM GUID

Accessibility: Read/Write

The identifier of the Web site for the discovery source.

3.1.5.10.1.2 ObjectPath Properties

3.1.5.10.1.2.1 Custodians

Type: Microsoft.Office.Server.Discovery.CustodianCollection

Accessibility: Read Only

The custodians associated with the discovery source.

3.1.5.10.2 Methods

3.1.5.10.2.1 Scalar Methods

3.1.5.10.2.1.1 AddCustodian

Return Type: None

Adds the custodian to the discovery source.

Parameters:

custodianToAdd: The custodian.

Type: Microsoft.Office.Server.Discovery.Custodian

3.1.5.10.2.1.2 DeleteSource

Return Type: None

Deletes the discovery source.

Parameters: None

3.1.5.10.2.1.3 Update

Return Type: None

Updates or adds the discovery source.

Parameters: None

3.1.5.10.2.1.4 UpdateErrorInfo

Return Type: None

Updates the error information for the discovery source.

Parameters: None

3.1.5.10.2.2 ObjectPath Methods

3.1.5.10.2.2.1 GetSource

This method is a static CSOM method.

Return Type: Microsoft.Office.Server.Discovery.Source

Gets a discovery source for a discovery case.

Parameters:

currentCase: The discovery case.

Type: Microsoft.Office.Server.Discovery.Case

sourceType: The type of discovery source.

Type: Microsoft.Office.Server.Discovery.SourceType

filter: A search query that identifies the discovery source.

Type: CSOM String

3.1.5.10.2.2.2 CSOM Constructor

Constructs a discovery source CSOM Object.

Parameters:

item: The list item that represents a discovery source.

Type: Microsoft.SharePoint.Client.ListItem

3.1.5.11 Microsoft.Office.Server.Discovery.SourceCollection

TypeId: {D3B71CCC-95A9-47F9-A58B-29C07D4DAADC}

ShortName: Microsoft.Office.Server.Discovery.SourceCollection

A collection of discovery sources.

3.1.5.11.1 Properties

3.1.5.11.1.1 Scalar Properties

None.

3.1.5.11.1.2 ObjectPath Properties

None.

3.1.5.11.2 Methods

3.1.5.11.2.1 Scalar Methods

None.

3.1.5.11.2.2 ObjectPath Methods

None.

3.1.5.12 Microsoft.Office.Server.Discovery.SourceGroup

TypeId: {5C9C4516-AC09-44EC-AF7D-8FA40D98FDF9}

ShortName: Microsoft.Office.Server.Discovery.SourceGroup

A group of discovery sources.

3.1.5.12.1 Properties

3.1.5.12.1.1 Scalar Properties

3.1.5.12.1.1.1 DateEndFilter

Type: CSOM DateTime

Accessibility: Read/Write

An end date filter to associate with the discovery sources.

3.1.5.12.1.1.2 DateStartFilter

Type: CSOM DateTime

Accessibility: Read/Write

A start date filter to associate with the discovery sources.

3.1.5.12.1.1.3 HoldId

Type: CSOM GUID

Accessibility: Read Only

The identifier of the legal hold associated with the discovery sources.

3.1.5.12.1.1.4 Items

Type: CSOM String

Accessibility: Read/Write

The identifiers of the discovery sources in the group.

3.1.5.12.1.1.5 Name

Type: CSOM String

Accessibility: Read/Write

The name of the group.

3.1.5.12.1.1.6 Preserve

Type: CSOM Boolean

Accessibility: Read/Write

Whether the group has an associated legal hold.

3.1.5.12.1.1.7 Query

Type: CSOM String

Accessibility: Read/Write

A search query filter for the group.

3.1.5.12.1.1.8 Size

Type: CSOM String

Accessibility: Read/Write

The estimated size of the content in the discovery sources associated with the group.

3.1.5.12.1.2 ObjectPath Properties

3.1.5.12.1.2.1 Sources

Type: Microsoft.Office.Server.Discovery.SourceCollection

Accessibility: Read Only

The discovery sources associated with the group.

3.1.5.12.2 Methods

3.1.5.12.2.1 Scalar Methods

3.1.5.12.2.1.1 AddSource

Return Type: None

Adds a discovery source.

Parameters:

sourceToAdd: The discovery source.

Type: Microsoft.Office.Server.Discovery.Source

3.1.5.12.2.1.2 ClearSources

Return Type: None

Removes all discovery sources from the group.

Parameters: None

3.1.5.12.2.1.3 DeleteSourceGroup

Return Type: None

Deletes the group.

Parameters: None

3.1.5.12.2.1.4 GetEffectiveQuery

Return Type: CSOM String

Gets an implementation specific search query that finds all content within discovery sources associated with the group.

Parameters: None

3.1.5.12.2.1.5 RemoveSource

Return Type: None

Removes a discovery source from the discovery source group.

Parameters:

sourceToRemove: The discovery source.

Type: Microsoft.Office.Server.Discovery.Source

3.1.5.12.2.1.6 Update

Return Type: None

Updates or adds the group.

Parameters: None

3.1.5.12.2.1.7 UpdateStatistics

Return Type: None

Updates the estimated number and size of items that are contained in the discovery sources in the group.

Parameters: None

3.1.5.12.2.2 ObjectPath Methods

None.

3.1.5.13 Microsoft.Office.Server.Discovery.SourceGroupCollection

TypeId: {25B212A9-5E5D-4965-B834-C69573FBDF17}

ShortName: Microsoft.Office.Server.Discovery.SourceGroupCollection

A collection of groups of discovery sources.

3.1.5.13.1 Properties

3.1.5.13.1.1 Scalar Properties

None.

3.1.5.13.1.2 ObjectPath Properties

None.

3.1.5.13.2 Methods

3.1.5.13.2.1 Scalar Methods

None.

3.1.5.13.2.2 ObjectPath Methods

None.

3.1.5.14 Microsoft.Office.Server.Discovery.SourceManagementType

ShortName: Microsoft.Office.Server.Discovery.SourceManagementType

Flag: false

The scope of discovery sources associated with a search query.

3.1.5.14.1 Field Values

3.1.5.14.1.1 AllContent

Value: 0

The search query includes content from all discovery sources in the discovery case.

3.1.5.14.1.2 SourceGroup

Value: 1

The search query includes content from discovery sources associated with one or more groups of discovery sources in the discovery case.

3.1.5.14.1.3 Source

Value: 2

The search query includes content from one or more specific discovery sources in the discovery case.

3.1.5.15 Microsoft.Office.Server.Discovery.SourceType

ShortName: Microsoft.Office.Server.Discovery.SourceType

Flag: false

The type of discovery source.

3.1.5.15.1 Field Values

3.1.5.15.1.1 Exchange

Value: 0

The discovery source is an email mailbox.

3.1.5.15.1.2 SharePoint

Value: 1

The discovery source is a Web site.

3.1.5.15.1.3 FileShare

Value: 2

The discovery source is a **UncPath**.

3.1.6 Timer Events

None.

3.1.7 Other Local Events

None.

4 Protocol Examples

The following examples show some common scenarios for working with a discovery case.

- Getting a discovery case
- Creating a discovery source
- Creating and preserving a group of discovery sources
- Creating a search query

4.1 Get a Discovery Case

In this example, an existing discovery case named "case1" is requested as follows by the protocol client:

```
<Request AddExpandFieldTypeSuffix="true" SchemaVersion="15.0.0.0" LibraryVersion="15.0.0.0"
ApplicationName=".NET Library"
xmlns="http://schemas.microsoft.com/sharepoint/clientquery/2009">
  <Actions>
    <ObjectPath Id="2" ObjectPathId="1" />
    <ObjectPath Id="4" ObjectPathId="3" />
    <Query Id="5" ObjectPathId="3">
      <Query SelectAllProperties="true">
        <Properties />
      </Query>
    </Query>
    <ObjectPath Id="7" ObjectPathId="6" />
    <ObjectIdentityQuery Id="8" ObjectPathId="6" />
    <Query Id="9" ObjectPathId="6">
      <Query SelectAllProperties="true">
        <Properties />
      </Query>
    </Query>
    <ObjectPath Id="11" ObjectPathId="10" />
    <Query Id="12" ObjectPathId="10">
      <Query SelectAllProperties="true">
        <Properties />
      </Query>
    </Query>
  </Actions>
  <ObjectPaths>
    <StaticProperty Id="1" TypeId="{3747adcd-a3c3-41b9-bfab-4a64dd2f1e0a}" Name="Current" />
    <Property Id="3" ParentId="1" Name="Site" />
    <Method Id="6" ParentId="3" Name="OpenWeb">
      <Parameters>
        <Parameter Type="String">case1</Parameter>
      </Parameters>
    </Method>
    <Constructor Id="10" TypeId="{df6ac2d8-cd50-4cf4-bc52-f61766f2e005}">
      <Parameters>
        <Parameter ObjectPathId="6" />
      </Parameters>
    </Constructor>
  </ObjectPaths>
</Request>
```

The protocol server responds as follows:

```
[
{
  "SchemaVersion":"15.0.0.0","LibraryVersion":"15.0.3326.1000","ErrorInfo":null
},2,{
  "IsNull":false
},4,{
  "IsNull":false
},5,{
  "_ObjectType_":"SP.Site","_ObjectIdentity_":"740c6a0b-85e2-48a0-a494-
e0f1759d4aa7:site:4380e80d-45f1-4075-b30e-
2d1e64719aad","AllowDesigner":true,"AllowMasterPageEditing":false,"AllowRevertFromTemplate":f
alse,"CompatibilityLevel":15,"Id":"\\Guid(4380e80d-45f1-4075-b30e-
2d1e64719aad)\\","LockIssue":null,"MaxItemsPerThrottledOperation":5000,"ReadOnly":false,"Serv
erRelativeUrl":"\\u002fsites\\u002fdiscovery","ShowUrlStructure":false,"UIVersionConfigurationE
nabled":false,"Url":"http:\\u002f\\u002fecmdiscovery\\u002fsites\\u002fdiscovery"
},7,{
  "IsNull":false
},8,{
  "_ObjectIdentity_":"740c6a0b-85e2-48a0-a494-e0f1759d4aa7:web:17fcfbd0-da19-4c47-bbf2-
3460ef498e2a"
},9,{
  "_ObjectType_":"SP.Web","_ObjectIdentity_":"740c6a0b-85e2-48a0-a494-
e0f1759d4aa7:web:17fcfbd0-da19-4c47-bbf2-
3460ef498e2a","AllowMasterPageEditingForCurrentUser":true,"AllowRevertFromTemplateForCurrentU
ser":true,"AllowRssFeeds":true,"Created":"\\Date(1317508226000)\\","CustomMasterUrl":"\\u002fs
ites\\u002fdiscovery\\u002fcase1\\u002f_catalogs\\u002fmasterpage\\u002fv15.master","Description":
"", "EnableMinimalDownload":false,"Id":"\\Guid(17fcfbd0-da19-4c47-bbf2-
3460ef498e2a)\\","Language":1033,"LastItemModifiedDate":"\\Date(1318357858000)\\","MasterUrl"
:"\\u002fsites\\u002fdiscovery\\u002fcase1\\u002f_catalogs\\u002fmasterpage\\u002fv15.master","Pare
ntWeb":{
  "_ObjectType_":"SP.WebInformation","Created":"\\Date(1317496560000)\\","Description":"","Id":
"\\Guid(2c45c1c6-0cf9-43b4-86bf-
17889568d004)\\","Language":1033,"LastItemModifiedDate":"\\Date(1317508239000)\\","Title":"Di
scovery Center","WebTemplateId":0
}, "QuickLaunchEnabled":true,"RecycleBinEnabled":true,"ServerRelativeUrl":"\\u002fsites\\u002fdi
scovery\\u002fcase1","ShowUrlStructureForCurrentUser":true,"SiteClientTag":0,"SyndicationEnabl
ed":true,"Title":"case1","TreeViewEnabled":false,"UIVersion":15,"UIVersionConfigurationEnabl
ed":false,"Url":"http:\\u002f\\u002fecmdiscovery\\u002fsites\\u002fdiscovery\\u002fcase1"
},11,{
  "IsNull":false
},12,{
  "_ObjectType_":"Microsoft.Office.Server.Discovery.Case","CaseClosed":false,"ClosedDate":"\\Da
te(1,0,1,0,0,0,0)\\","ConsoleId":"\\Guid(4380e80d-45f1-4075-b30e-
2d1e64719aad)\\","Id":"\\Guid(17fcfbd0-da19-4c47-bbf2-
3460ef498e2a)\\","PreservedItems":0,"PreservedSize":0,"TotalItems":0,"TotalSize":0
}
]
```

4.2 Create a Source

In this example, the protocol client creates a new discovery source for the discovery case created in section 4.1 by sending the request as follows:

```
<Request AddExpandoFieldTypeSuffix="true" SchemaVersion="15.0.0.0" LibraryVersion="15.0.0.0"
ApplicationName=".NET Library"
xmlns="http://schemas.microsoft.com/sharepoint/clientquery/2009">
  <Actions><ObjectPath Id="17" ObjectPathId="16" />
    <SetProperty Id="18" ObjectPathId="16" Name="DisplayId">
```



```

    <Parameter Type="String">17fcfbd0-da19-4c47-bbf2-3460ef498e2a</Parameter>
  </SetProperty>
  <SetProperty Id="19" ObjectPathId="16" Name="Name">
    <Parameter Type="String">case1</Parameter>
  </SetProperty>
  <SetProperty Id="20" ObjectPathId="16" Name="ContainerId">
    <Parameter Type="String">17fcfbd0-da19-4c47-bbf2-3460ef498e2a</Parameter>
  </SetProperty>
  <SetProperty Id="21" ObjectPathId="16" Name="WebId">
    <Parameter Type="Guid">{17fcfbd0-da19-4c47-bbf2-3460ef498e2a}</Parameter>
  </SetProperty>
  <Method Name="Update" Id="22" ObjectPathId="16" />
</Actions>
<ObjectPaths>
  <Method Id="16" ParentId="10" Name="CreateLocation" />
  <Constructor Id="10" TypeId="{df6ac2d8-cd50-4cf4-bc52-f61766f2e005}">
    <Parameters>
      <Parameter ObjectPathId="6" />
    </Parameters>
  </Constructor>
  <Identity Id="6" Name="740c6a0b-85e2-48a0-a494-e0f1759d4aa7:web:17fcfbd0-da19-4c47-bbf2-3460ef498e2a" />
</ObjectPaths>
</Request>

```

The protocol server responds as follows:

```

[
{
  "SchemaVersion":"15.0.0.0","LibraryVersion":"15.0.3326.1000","ErrorInfo":null
},17,{
  "IsNull":false
}
]

```

4.3 Create and Preserve a Discovery Source Group

In this example, a new group of discovery sources with the name "Case Sources" is created and placed on legal hold by sending the request as follows:

```

<Request AddExpandoFieldTypeSuffix="true" SchemaVersion="15.0.0.0" LibraryVersion="15.0.0.0"
ApplicationName=".NET Library"
xmlns="http://schemas.microsoft.com/sharepoint/clientquery/2009">
  <Actions>
    <ObjectPath Id="17" ObjectPathId="16" />
    <SetProperty Id="18" ObjectPathId="16" Name="Name">
      <Parameter Type="String">Case Sources</Parameter>
    </SetProperty>
    <SetProperty Id="19" ObjectPathId="16" Name="Preserve">
      <Parameter Type="Boolean">true</Parameter>
    </SetProperty>
    <Method Name="Update" Id="20" ObjectPathId="16" />
  </Actions>
  <ObjectPaths>
    <Method Id="16" ParentId="10" Name="CreateSourceGroup" />
  </ObjectPaths>
</Request>

```

```

    <Constructor Id="10" TypeId="{df6ac2d8-cd50-4cf4-bc52-f61766f2e005}">
      <Parameters>
        <Parameter ObjectPathId="6" />
      </Parameters>
    </Constructor>
    <Identity Id="6" Name="740c6a0b-85e2-48a0-a494-e0f1759d4aa7:web:17fcfbd0-da19-4c47-bbf2-3460ef498e2a" />
  </ObjectPaths>
</Request>

```

The protocol server responds as follows:

```

[
{
  "SchemaVersion":"15.0.0.0","LibraryVersion":"15.0.3326.1000","ErrorInfo":null
},17,{
  "IsNull":false
}
]

```

4.4 Create a Query

In this example, a new search query "contoso AND fabrikam" is created and named "New Query" by sending the request as follows:

```

<Request AddExpandFieldTypeSuffix="true" SchemaVersion="15.0.0.0" LibraryVersion="15.0.0.0"
ApplicationName=".NET Library"
xmlns="http://schemas.microsoft.com/sharepoint/clientquery/2009">
  <Actions>
    <ObjectPath Id="17" ObjectPathId="16" />
    <SetProperty Id="18" ObjectPathId="16" Name="Name">
      <Parameter Type="String">New Query</Parameter>
    </SetProperty>
    <SetProperty Id="19" ObjectPathId="16" Name="Query">
      <Parameter Type="String">contoso AND fabrikam</Parameter>
    </SetProperty>
    <Method Name="Update" Id="20" ObjectPathId="16" />
  </Actions>
  <ObjectPaths>
    <Method Id="16" ParentId="10" Name="CreateSavedSearch" />
    <Constructor Id="10" TypeId="{df6ac2d8-cd50-4cf4-bc52-f61766f2e005}">
      <Parameters>
        <Parameter ObjectPathId="6" />
      </Parameters>
    </Constructor>
    <Identity Id="6" Name="740c6a0b-85e2-48a0-a494-e0f1759d4aa7:web:17fcfbd0-da19-4c47-bbf2-3460ef498e2a" />
  </ObjectPaths>
</Request>

```

The protocol server responds as follows:

```

[
{
  "SchemaVersion":"15.0.0.0","LibraryVersion":"15.0.3326.1000","ErrorInfo":null
},17,{
  "IsNull":false
}
]

```

}
]

Preliminary

5 Security

5.1 Security Considerations for Implementers

None.

5.2 Index of Security Parameters

None.

6 Appendix A: Product Behavior

The information in this specification is applicable to the following Microsoft products or supplemental software. References to product versions include released service packs:

- Microsoft® SharePoint® Server 2013 Preview

Exceptions, if any, are noted below. If a service pack or Quick Fix Engineering (QFE) number appears with the product version, behavior changed in that service pack or QFE. The new behavior also applies to subsequent service packs of the product unless otherwise specified. If a product edition appears with the product version, behavior is different in that product edition.

Unless otherwise specified, any statement of optional behavior in this specification that is prescribed using the terms SHOULD or SHOULD NOT implies product behavior in accordance with the SHOULD or SHOULD NOT prescription. Unless otherwise specified, the term MAY implies that the product does not follow the prescription.

7 Change Tracking

No table of changes is available. The document is either new or has had no changes since its last release.

8 Index

A

Abstract data model
 [server](#) 12
[Applicability](#) 10

C

[Capability negotiation](#) 10
[Case object](#) 15
[Change tracking](#) 46
[Common Exceptions message](#) 11
[Create a query example](#) 42
[Create a source example](#) 40
[Create and preserve a discovery source group example](#) 41
[Custodian object](#) 18
[CustodianCollection object](#) 19

D

Data model - abstract
 [server](#) 12

E

Examples
 [create a query](#) 42
 [create a source](#) 40
 [create and preserve a discovery source group](#) 41
 [get a discovery case](#) 39
 [overview](#) 39
[Export object](#) 19
[ExportCollection object](#) 24
[ExportStatus object](#) 25

F

[Fields - vendor-extensible](#) 10

G

[Get a discovery case example](#) 39
[Glossary](#) 8

H

Higher-layer triggered events
 [server](#) 12

I

[Implementer - security considerations](#) 44
[Index of security parameters](#) 44
[Informative references](#) 9
Initialization
 [server](#) 12
[Introduction](#) 8

M

Messages
 [Common Exceptions](#) 11
 [transport](#) 11

N

[Normative references](#) 8

O

Objects
 [Case](#) 15
 [Custodian](#) 18
 [CustodianCollection](#) 19
 [Export](#) 19
 [ExportCollection](#) 24
 [ExportStatus](#) 25
 [ProjectPolicy](#) 12
 [SavedSearch](#) 25
 [SavedSearchCollection](#) 28
 [Source](#) 29
 [SourceCollection](#) 33
 [SourceGroup](#) 33
 [SourceGroupCollection](#) 36
 [SourceManagementType](#) 37
 [SourceType](#) 37
Other local events
 [server](#) 38
 [Overview \(synopsis\)](#) 9

P

[Parameters - security index](#) 44
[Preconditions](#) 10
[Prerequisites](#) 10
[Product behavior](#) 45
[ProjectPolicy object](#) 12
[Protocol examples](#) 39

R

[References](#) 8
 [informative](#) 9
 [normative](#) 8
[Relationship to other protocols](#) 9

S

[SavedSearch object](#) 25
[SavedSearchCollection object](#) 28
Security
 [implementer considerations](#) 44
 [parameter index](#) 44
Server
 [abstract data model](#) 12
 [higher-layer triggered events](#) 12

[initialization](#) 12
[other local events](#) 38
[timer events](#) 38
[timers](#) 12
[Source object](#) 29
[SourceCollection object](#) 33
[SourceGroup object](#) 33
[SourceGroupCollection object](#) 36
[SourceManagementType object](#) 37
[SourceType object](#) 37
[Standards assignments](#) 10

T

Timer events
 [server](#) 38
Timers
 [server](#) 12
[Tracking changes](#) 46
[Transport](#) 11
Triggered events - higher-layer
 [server](#) 12

V

[Vendor-extensible fields](#) 10
[Versioning](#) 10