

# [MS-EDCSOM]:

## eDiscovery Client-Side Object Model Protocol

---

### Intellectual Property Rights Notice for Open Specifications Documentation

- **Technical Documentation.** Microsoft publishes Open Specifications documentation (“this documentation”) for protocols, file formats, data portability, computer languages, and standards support. Additionally, overview documents cover inter-protocol relationships and interactions.
- **Copyrights.** This documentation is covered by Microsoft copyrights. Regardless of any other terms that are contained in the terms of use for the Microsoft website that hosts this documentation, you can make copies of it in order to develop implementations of the technologies that are described in this documentation and can distribute portions of it in your implementations that use these technologies or in your documentation as necessary to properly document the implementation. You can also distribute in your implementation, with or without modification, any schemas, IDLs, or code samples that are included in the documentation. This permission also applies to any documents that are referenced in the Open Specifications documentation.
- **No Trade Secrets.** Microsoft does not claim any trade secret rights in this documentation.
- **Patents.** Microsoft has patents that might cover your implementations of the technologies described in the Open Specifications documentation. Neither this notice nor Microsoft's delivery of this documentation grants any licenses under those patents or any other Microsoft patents. However, a given Open Specifications document might be covered by the Microsoft [Open Specifications Promise](#) or the [Microsoft Community Promise](#). If you would prefer a written license, or if the technologies described in this documentation are not covered by the Open Specifications Promise or Community Promise, as applicable, patent licenses are available by contacting [iplg@microsoft.com](mailto:iplg@microsoft.com).
- **License Programs.** To see all of the protocols in scope under a specific license program and the associated patents, visit the [Patent Map](#).
- **Trademarks.** The names of companies and products contained in this documentation might be covered by trademarks or similar intellectual property rights. This notice does not grant any licenses under those rights. For a list of Microsoft trademarks, visit [www.microsoft.com/trademarks](http://www.microsoft.com/trademarks).
- **Fictitious Names.** The example companies, organizations, products, domain names, email addresses, logos, people, places, and events that are depicted in this documentation are fictitious. No association with any real company, organization, product, domain name, email address, logo, person, place, or event is intended or should be inferred.

**Reservation of Rights.** All other rights are reserved, and this notice does not grant any rights other than as specifically described above, whether by implication, estoppel, or otherwise.

**Tools.** The Open Specifications documentation does not require the use of Microsoft programming tools or programming environments in order for you to develop an implementation. If you have access to Microsoft programming tools and environments, you are free to take advantage of them. Certain Open Specifications documents are intended for use in conjunction with publicly available standards specifications and network programming art and, as such, assume that the reader either is familiar with the aforementioned material or has immediate access to it.

**Support.** For questions and support, please contact [dochelp@microsoft.com](mailto:dochelp@microsoft.com).

**Preliminary Documentation.** This particular Open Specifications document provides documentation for past and current releases and/or for the pre-release version of this technology. This document provides final documentation for past and current releases and preliminary documentation, as applicable and specifically noted in this document, for the pre-release version. Microsoft will release final documentation in connection with the commercial release of the updated or new version of this technology. Because this documentation might change between the pre-release version and the final

version of this technology, there are risks in relying on this preliminary documentation. To the extent that you incur additional development obligations or any other costs as a result of relying on this preliminary documentation, you do so at your own risk.

Preliminary

## Revision Summary

Date	Revision History	Revision Class	Comments
1/20/2012	0.1	New	Released new document.
4/11/2012	0.1	None	No changes to the meaning, language, or formatting of the technical content.
7/16/2012	0.1	None	No changes to the meaning, language, or formatting of the technical content.
9/12/2012	0.1	None	No changes to the meaning, language, or formatting of the technical content.
10/8/2012	1.0	Major	Significantly changed the technical content.
2/11/2013	1.0	None	No changes to the meaning, language, or formatting of the technical content.
7/30/2013	1.0	None	No changes to the meaning, language, or formatting of the technical content.
11/18/2013	1.0	None	No changes to the meaning, language, or formatting of the technical content.
2/10/2014	1.0	None	No changes to the meaning, language, or formatting of the technical content.
4/30/2014	1.0	None	No changes to the meaning, language, or formatting of the technical content.
7/31/2014	1.0	None	No changes to the meaning, language, or formatting of the technical content.
10/30/2014	1.0	None	No changes to the meaning, language, or formatting of the technical content.
2/26/2016	2.0	Major	Significantly changed the technical content.
7/15/2016	2.0	None	No changes to the meaning, language, or formatting of the technical content.
8/25/2017	3.0	Major	Significantly changed the technical content.
12/12/2017	3.1	Minor	Clarified the meaning of the technical content.
7/24/2018	4.0	Major	Significantly changed the technical content.

# Table of Contents

<b>1</b>	<b>Introduction .....</b>	<b>6</b>
1.1	Glossary .....	6
1.2	References .....	7
1.2.1	Normative References .....	7
1.2.2	Informative References .....	7
1.3	Overview .....	7
1.4	Relationship to Other Protocols .....	8
1.5	Prerequisites/Preconditions .....	8
1.6	Applicability Statement .....	8
1.7	Versioning and Capability Negotiation .....	8
1.8	Vendor-Extensible Fields .....	8
1.9	Standards Assignments.....	8
<b>2</b>	<b>Messages.....</b>	<b>9</b>
2.1	Transport .....	9
2.2	Message Syntax .....	9
2.2.1	Common Exceptions.....	9
<b>3</b>	<b>Protocol Details.....</b>	<b>10</b>
3.1	Server Details.....	10
3.1.1	Abstract Data Model .....	10
3.1.2	Timers .....	10
3.1.3	Initialization.....	10
3.1.4	Higher-Layer Triggered Events .....	10
3.1.5	Message Processing Events and Sequencing Rules .....	10
3.1.5.1	Microsoft.SharePoint.Client.Discovery.Case .....	10
3.1.5.1.1	Properties.....	11
3.1.5.1.1.1	Scalar Properties.....	11
3.1.5.1.1.2	ObjectPath Properties .....	11
3.1.5.1.2	Methods .....	11
3.1.5.1.2.1	Scalar Methods .....	11
3.1.5.1.2.1.1	GetExportContent.....	11
3.1.5.1.2.2	ObjectPath Methods .....	11
3.1.5.1.2.2.1	CSOM Constructor .....	11
3.1.5.2	Microsoft.SharePoint.Client.Discovery.Export.....	11
3.1.5.2.1	Properties.....	11
3.1.5.2.1.1	Scalar Properties.....	11
3.1.5.2.1.1.1	Status.....	11
3.1.5.2.1.2	ObjectPath Properties .....	12
3.1.5.2.2	Methods .....	12
3.1.5.2.2.1	Scalar Methods .....	12
3.1.5.2.2.1.1	GetExportContent.....	12
3.1.5.2.2.1.2	Update.....	14
3.1.5.2.2.2	ObjectPath Methods .....	14
3.1.5.2.2.2.1	CSOM Constructor .....	14
3.1.5.3	Microsoft.SharePoint.Client.Discovery.ExportStatus .....	14
3.1.5.3.1	Field Values .....	14
3.1.5.3.1.1	NotStarted .....	14
3.1.5.3.1.2	Started .....	14
3.1.5.3.1.3	Complete .....	14
3.1.5.3.1.4	Failed .....	14
3.1.5.4	Microsoft.SharePoint.Client.InformationPolicy.ProjectPolicy .....	15
3.1.5.4.1	Properties.....	15
3.1.5.4.1.1	Scalar Properties.....	15
3.1.5.4.1.1.1	Description .....	15

3.1.5.4.1.1.2	EmailBody .....	15
3.1.5.4.1.1.3	EmailBodyWithTeamMailbox .....	15
3.1.5.4.1.1.4	EmailSubject.....	15
3.1.5.4.1.1.5	Name.....	15
3.1.5.4.1.2	ObjectPath Properties .....	16
3.1.5.4.2	Methods .....	16
3.1.5.4.2.1	Scalar Methods .....	16
3.1.5.4.2.1.1	ApplyProjectPolicy .....	16
3.1.5.4.2.1.2	CloseProject.....	16
3.1.5.4.2.1.3	DoesProjectHavePolicy .....	17
3.1.5.4.2.1.4	GetProjectCloseDate .....	17
3.1.5.4.2.1.5	GetProjectExpirationDate.....	18
3.1.5.4.2.1.6	IsProjectClosed .....	18
3.1.5.4.2.1.7	OpenProject.....	18
3.1.5.4.2.1.8	PostponeProject .....	19
3.1.5.4.2.1.9	SavePolicy .....	19
3.1.5.4.2.2	ObjectPath Methods .....	19
3.1.5.4.2.2.1	GetCurrentlyAppliedProjectPolicyOnWeb .....	19
3.1.5.4.2.2.2	GetProjectPolicies .....	20
3.1.5.5	Microsoft.SharePoint.Client.RecordsRepository.Records.....	20
3.1.5.5.1	Properties.....	20
3.1.5.5.1.1	Scalar Properties.....	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	DeclareItemAsRecord.....	21
3.1.5.5.2.1.2	IsRecord .....	21
3.1.5.5.2.1.3	UndeclareItemAsRecord .....	21
3.1.5.5.2.2	ObjectPath Methods .....	22
3.1.6	Timer Events.....	22
3.1.7	Other Local Events.....	22
<b>4</b>	<b>Protocol Examples .....</b>	<b>23</b>
<b>5</b>	<b>Security .....</b>	<b>24</b>
5.1	Security Considerations for Implementers .....	24
5.2	Index of Security Parameters .....	24
<b>6</b>	<b>Appendix A: Product Behavior .....</b>	<b>25</b>
<b>7</b>	<b>Change Tracking.....</b>	<b>26</b>
<b>8</b>	<b>Index.....</b>	<b>27</b>

# 1 Introduction

The eDiscovery Client-Side Object Model Protocol provides types, methods, and properties to enable a protocol client to access and control electronic discovery (eDiscovery) data stored on a protocol server.

Sections 1.5, 1.8, 1.9, 2, and 3 of this specification are normative. All other sections and examples in this specification are informative.

## 1.1 Glossary

This document uses the following terms:

**CSOM array:** An ordered collection of values that can be used in an XML request or JSON response text. The values are identified by their position and their position is determined by a zero-based integer index.

**CSOM Boolean:** A Boolean value that can be used in an XML request or JSON response text. A CSOM Boolean value is either "true" or "false".

**CSOM DateTime:** An Int64 value that represents the number of 100-nanosecond time intervals that have elapsed since 12:00:00, January 1, 0001. It can be used in an XML request or as a string in JSON response text. The value can represent time intervals through 23:59:59.9999999, December 31, 9999. It can also specify whether a local, UTC, or no time zone applies.

**CSOM Int32:** A 32-bit, signed integer value, which is the INT32 type described in [\[MS-DTYP\]](#), that can be used in an XML request or as a number in JSON response text. The range of CSOM Int32 values is from "-2147483648" to "2147483647".

**CSOM Object:** An object that contains a set of members, which are named values and methods. It has a Unicode string value, which is referred to as a CSOM type name, that identifies its type.

**CSOM String:** A representation of text as a series of Unicode characters. It can be used in an XML request or JSON response text.

**custodian:** A user that is part of a discovery litigation that allows attorneys to associate users with the **discovery sources**.

**discovery case:** A site that contains information relevant to an electronic discovery (eDiscovery) case such as a **custodian**, a **discovery source**, and saved searches.

**discovery source:** A repository of documents and other types of content that are relevant to the electronic discovery (eDiscovery) case.

**Information Rights Management (IRM):** A technology that provides persistent protection to digital data by using encryption, certificates, and authentication. Authorized recipients or users acquire a license to gain access to the protected files according to the rights or business rules that are set by the content owner.

**legal hold:** A restriction that prevents a document from being modified or transactions from being entered for a record.

**list item:** An individual entry within a SharePoint list. Each list item has a schema that maps to fields in the list that contains the item, depending on the content type of the item.

**policy:** A set of rules that governs all interactions with an object such as a document or item.

**search query:** A complete set of conditions that are used to generate search results, including query text, sort order, and ranking parameters.

**site:** A group of related pages and data within a SharePoint site collection. The structure and content of a site is based on a site definition. Also referred to as SharePoint site and web site.

**static CSOM method:** A class method that is accessed through the type name rather than an instance of the class.

**Uniform Resource Locator (URL):** A string of characters in a standardized format that identifies a document or resource on the World Wide Web. The format is as specified in [\[RFC1738\]](#).

**website:** A group of related pages and data within a SharePoint site collection. The structure and content of a site is based on a site definition. Also referred to as SharePoint site and site.

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

## 1.2 References

Links to a document in the Microsoft Open Specifications library point to the correct section in the most recently published version of the referenced document. However, because individual documents in the library are not updated at the same time, the section numbers in the documents may not match. You can confirm the correct section numbering by checking the [Errata](#).

### 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](mailto:dochelp@microsoft.com). We will assist you in finding the relevant information.

[MS-CSOMSPT] Microsoft Corporation, "[SharePoint Client-Side Object Model Protocol](#)".

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

[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.rfc-editor.org/rfc/rfc2616.txt>

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

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

### 1.2.2 Informative References

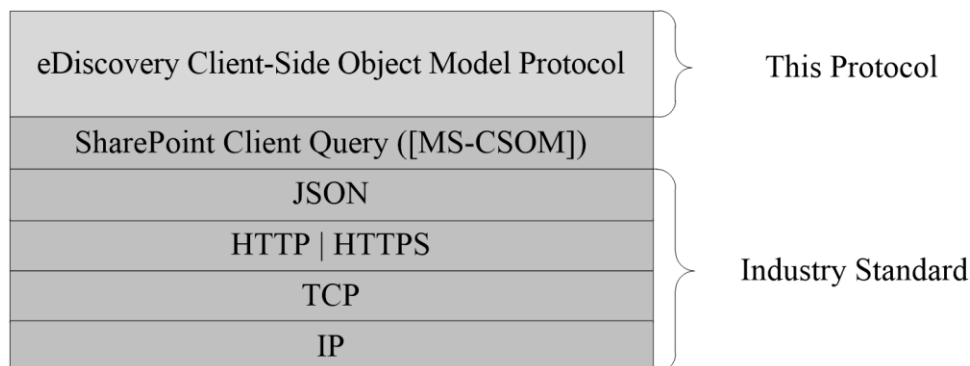
None.

## 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 can 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 a **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 can 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 **websites** 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.SharePoint.Client.Discovery.Case

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

**ShortName:** SP.Discovery.Case

A **discovery case**.

### 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 GetExportContent

**Return Type:** **CSOM String**

This method returns the export configuration content.

**Parameters:**

*sourceIds*: The identifier of each export included for the export content.

Type: **CSOM array** of **CSOM Int32**

#### 3.1.5.1.2.2 ObjectPath Methods

##### 3.1.5.1.2.2.1 CSOM Constructor

Constructs a **discovery case CSOM Object**.

**Parameters:**

*web*: The **site** that represents a discovery case.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

### 3.1.5.2 Microsoft.SharePoint.Client.Discovery.Export

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

**ShortName:** SP.Discovery.Export

Represents an export associated with a **discovery case**.

### 3.1.5.2.1 Properties

#### 3.1.5.2.1.1 Scalar Properties

##### 3.1.5.2.1.1.1 Status

**Type:** Microsoft.SharePoint.Client.Discovery.ExportStatus

**Accessibility:** Read/Write

The status of the export, which MUST be a value as specified in section [3.1.5.3](#).

### 3.1.5.2.1.2 ObjectPath Properties

None.

### 3.1.5.2.2 Methods

#### 3.1.5.2.2.1 Scalar Methods

##### 3.1.5.2.2.1.1 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:element name="Sources" minOccurs="1" maxOccurs="1" type="xsi:sources"/>
      </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="IncludeUncrawlableContent" type="xs:boolean" minOccurs="1"
maxOccurs="1" />
  <xs:element name="EstimatedItems" type="xs:double" minOccurs="1" maxOccurs="1" />
  <xs:element name="EstimatedSize" type="xs:double" 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: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:sequence>
  </xs:complexType>
</xs:schema>
```

```

        <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 is removed from the content.
  - **RemoveRms:** Whether **Information Rights Management (IRM)** encryption is removed from the exported content.
  - **IncludeVersions:** Whether versions of content are included in the export.
  - **IncludeUncrawlableContent:** Whether content that cannot be crawled is 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

### 3.1.5.2.2.1.2 Update

**Return Type:** None

Updates or adds the export in a **discovery case**.

**Parameters:** None

### 3.1.5.2.2.2 ObjectPath Methods

#### 3.1.5.2.2.2.1 CSOM Constructor

Constructs a discovery export **CSOM Object**.

**Parameters:**

*item:* The **list item** that represents a discovery export.

Type: Microsoft.SharePoint.Client.ListItem

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.87.

### 3.1.5.3 Microsoft.SharePoint.Client.Discovery.ExportStatus

**ShortName:** SP.Discovery.ExportStatus

**Flag:** false

Represents the status of an export.

#### 3.1.5.3.1 Field Values

##### 3.1.5.3.1.1 NotStarted

**Value:** 0

The export has not yet been downloaded.

##### 3.1.5.3.1.2 Started

**Value:** 1

The client has started processing the export.

##### 3.1.5.3.1.3 Complete

**Value:** 2

The client has finished processing the export.

##### 3.1.5.3.1.4 Failed

**Value:** 3

The client failed to process the export.

### **3.1.5.4 Microsoft.SharePoint.Client.InformationPolicy.ProjectPolicy**

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

**ShortName:** SP.InformationPolicy.ProjectPolicy

A **policy** associated with a **website** or email mailbox.

#### **3.1.5.4.1 Properties**

##### **3.1.5.4.1.1 Scalar Properties**

###### **3.1.5.4.1.1.1 Description**

**Type:** CSOM String

**Accessibility:** Read Only

The description of the **policy**.

###### **3.1.5.4.1.1.2 EmailBody**

**Type:** CSOM String

**Accessibility:** Read/Write

The body of the notification email if there is no site mailbox associated with the **site**.

The **policy** can be configured to send a notification email to site owners in advance of the site deletion.

###### **3.1.5.4.1.1.3 EmailBodyWithTeamMailbox**

**Type:** CSOM String

**Accessibility:** Read/Write

The body of the notification email if there is a site mailbox associated with the **site**.

The **policy** can be configured to send a notification email to site owners in advance of the site deletion.

###### **3.1.5.4.1.1.4 EmailSubject**

**Type:** CSOM String

**Accessibility:** Read/Write

The subject of the notification email.

The **policy** can be configured to send a notification email to **site** owners in advance of the site deletion.

###### **3.1.5.4.1.1.5 Name**

Type: **CSOM String**

Accessibility: Read Only

The name of the **policy**.

### 3.1.5.4.1.2 ObjectPath Properties

None.

### 3.1.5.4.2 Methods

#### 3.1.5.4.2.1 Scalar Methods

##### 3.1.5.4.2.1.1 ApplyProjectPolicy

This method is a **static CSOM method**.

**Return Type:** None

Apply the **policy** to the **site**. If the site already has a policy applied, the new policy will replace the existing policy.

**Parameters:**

*web*: The site that will have the policy to be applied.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

*projectPolicy*: The policy that will be applied to the site.

Type: Microsoft.SharePoint.Client.InformationPolicy.ProjectPolicy

It MUST NOT be NULL.

**Exceptions:**

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	<i>web</i> is null or <i>projectPolicy</i> is null.

##### 3.1.5.4.2.1.2 CloseProject

This method is a **static CSOM method**.

**Return Type:** None

Close the **site** if the site has a **policy** applied and the site is open.

**Parameters:**

*web*: The site to be closed.

Type: Microsoft.SharePoint.Client.Web



The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

**Exceptions:**

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	<i>web</i> is null.

### 3.1.5.4.2.1.3 DoesProjectHavePolicy

This method is a **static CSOM method**.

**Return Type: CSOM Boolean**

Checks whether the **website** has an associated policy.

**Parameters:**

*web*: The **site**.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

**Exceptions:**

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

### 3.1.5.4.2.1.4 GetProjectCloseDate

This method is a **static CSOM method**.

**Return Type: CSOM DateTime**

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

**Parameters:**

*web*: The **site**.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

**Exceptions:**

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

### 3.1.5.4.2.1.5 GetProjectExpirationDate

This method is a **static CSOM method**.

**Return Type: CSOM DateTime**

Gets the expiration date of the **website** 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**.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

**Exceptions:**

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

### 3.1.5.4.2.1.6 IsProjectClosed

This method is a **static CSOM method**.

**Return Type: CSOM Boolean**

Checks whether the **website** is in archival (closed).

**Parameters:**

*web*: The **site**.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

**Exceptions:**

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

### 3.1.5.4.2.1.7 OpenProject

This method is a **static CSOM method**.

**Return Type:** None

Open the **site** if the site has a **policy** applied and the site is closed.

**Parameters:**

*web*: The site to be opened.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

**Exceptions:**

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	<i>web</i> is null.

### 3.1.5.4.2.1.8 PostponeProject

This method is a **static CSOM method**.

**Return Type:** None

Postpone the expiration date of the **site** based on the **policy** if the site has a policy applied and the site has the expiration date.

**Parameters:**

*web*: The site to be postponed.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

**Exceptions:**

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	<i>web</i> is null.

### 3.1.5.4.2.1.9 SavePolicy

**Return Type:** None

Save the changes that are made to the current **policy**.

**Parameters:** None

### 3.1.5.4.2.2 ObjectPath Methods

#### 3.1.5.4.2.2.1 GetCurrentlyAppliedProjectPolicyOnWeb

This method is a **static CSOM method**.

**Return Type:** Microsoft.SharePoint.Client.InformationPolicy.ProjectPolicy

Gets the **policy** that is currently applied to the **site** if the site has a policy applied.

**Parameters:**

*web*: The site that has a policy applied.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

**Exceptions:**

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	<i>web</i> is null.

#### 3.1.5.4.2.2.2 GetProjectPolicies

This method is a **static CSOM method**.

**Return Type:** **CSOM array** of Microsoft.SharePoint.Client.InformationPolicy.ProjectPolicy

Gets all **policies** that are available on the **site**.

**Parameters:**

*web*: The site that might have one or more policies.

Type: Microsoft.SharePoint.Client.Web

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.143.

It MUST NOT be NULL.

**Exceptions:**

Error Code	Error Type Name	Condition
-2147467261	System.ArgumentNullException	<i>web</i> is null.

### 3.1.5.5 Microsoft.SharePoint.Client.RecordsRepository.Records

**TypeId:** {EA8E1356-5910-4E69-BC05-D0C30ED657FC}

**ShortName:** SP.RecordsRepository.Records

A static class to check record status, declare a record, and undeclare a record.

### 3.1.5.5.1 Properties

#### 3.1.5.5.1.1 Scalar Properties

None.

#### 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 DeclareItemAsRecord

This method is a **static CSOM method**.

**Return Type:** None

Declares a list item as a record.

**Parameters:**

*itemToDeclare*: List item to be declared as a record.

Type: Microsoft.SharePoint.Client.ListItem

##### 3.1.5.5.2.1.2 IsRecord

This method is a **static CSOM method**.

**Return Type:** CSOM Boolean

Returns whether a list item is a record.

**Parameters:**

*item*: A list item to be checked whether it is a record or not.

Type: Microsoft.SharePoint.Client.ListItem

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.87.

MUST NOT be null.

##### 3.1.5.5.2.1.3 UndeclareItemAsRecord

This method is a **static CSOM method**.

**Return Type:** None

Undeclares a record item.

**Parameters:**

*item*: List item to be undeclared.

Type: Microsoft.SharePoint.Client.ListItem

The type is specified in [\[MS-CSOMSPT\]](#) section 3.2.5.87.

MUST NOT be null.

#### **3.1.5.5.2.2 ObjectPath Methods**

None.

#### **3.1.6 Timer Events**

None.

#### **3.1.7 Other Local Events**

None.

## 4 Protocol Examples

None.

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 updates to those products.

- Microsoft SharePoint Server 2013
- Microsoft SharePoint Server 2016
- Microsoft SharePoint Server 2019 Preview

Exceptions, if any, are noted in this section. If an update version, service pack or Knowledge Base (KB) number appears with a product name, the behavior changed in that update. The new behavior also applies to subsequent updates 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

This section identifies changes that were made to this document since the last release. Changes are classified as Major, Minor, or None.

The revision class **Major** means that the technical content in the document was significantly revised. Major changes affect protocol interoperability or implementation. Examples of major changes are:

- A document revision that incorporates changes to interoperability requirements.
- A document revision that captures changes to protocol functionality.

The revision class **Minor** means that the meaning of the technical content was clarified. Minor changes do not affect protocol interoperability or implementation. Examples of minor changes are updates to clarify ambiguity at the sentence, paragraph, or table level.

The revision class **None** means that no new technical changes were introduced. Minor editorial and formatting changes may have been made, but the relevant technical content is identical to the last released version.

The changes made to this document are listed in the following table. For more information, please contact [dochelp@microsoft.com](mailto:dochelp@microsoft.com).

Section	Description	Revision class
<a href="#">6</a> Appendix A: Product Behavior	Updated list of supported products.	Major

## 8 Index

### A

Abstract data model  
[server](#) 10  
[Applicability](#) 8

### C

[Capability negotiation](#) 8  
[Case object](#) 10  
[Change tracking](#) 26  
[Common Exceptions message](#) 9

### D

Data model - abstract  
[server](#) 10

### E

Examples  
[overview](#) 23  
[Export object](#) 11

### F

[Fields - vendor-extensible](#) 8

### G

[Glossary](#) 6

### H

Higher-layer triggered events  
[server](#) 10

### I

[Implementer - security considerations](#) 24  
[Index of security parameters](#) 24  
[Informative references](#) 7  
Initialization  
[server](#) 10  
[Introduction](#) 6

### M

Messages  
[Common Exceptions](#) 9  
[transport](#) 9

### N

[Normative references](#) 7

### O

Objects  
[Case](#) 10

[Export](#) 11  
[ProjectPolicy](#) 15  
Other local events  
[server](#) 22  
[Overview \(synopsis\)](#) 7

### P

[Parameters - security index](#) 24  
[Preconditions](#) 8  
[Prerequisites](#) 8  
[Product behavior](#) 25  
[ProjectPolicy object](#) 15  
[Protocol examples](#) 23

### R

[References](#) 7  
[informative](#) 7  
[normative](#) 7  
[Relationship to other protocols](#) 8

### S

Security  
[implementer considerations](#) 24  
[parameter index](#) 24  
Server  
[abstract data model](#) 10  
[higher-layer triggered events](#) 10  
[initialization](#) 10  
[other local events](#) 22  
[timer events](#) 22  
[timers](#) 10  
[Standards assignments](#) 8

### T

Timer events  
[server](#) 22  
Timers  
[server](#) 10  
[Tracking changes](#) 26  
[Transport](#) 9  
Triggered events - higher-layer  
[server](#) 10

### V

[Vendor-extensible fields](#) 8  
[Versioning](#) 8