# ZL UA REST API Kit Reference Guide

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# Introduction to REST API

The REST API provides integration of the ZL UA High Performance API Kit for compatibility with REST architecture and Web services. This results in several advantages:

- For cloud-based Web services, REST is a standard today.
- Easy adaptation of REST APIs into any programming language.
- Simpler implementation and testing of tools built with REST-based APIs.
- Standardizes ZL UA's API services.

You can call ZL UA's REST API in several ways, and you can create your own client or use existing tools like Postman and Swagger. Examples are provided in the following sections.

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## Authorization in the REST API

Before making any REST API call, you need to authenticate the application using ZL bearer tokens. You need to send the bearer token in the headers along with the requested URL to the REST API.

To get the ZL bearer token, you need to call the **getToken** API. You need to pass three parameters in this API.

1. **certificateBody**: ZL server issued certificate file body.
2. **Password**: the password used to encrypt the certificate.
3. **tenantId**: Tenant ID of the ZL server.

A client code example for calling the **getToken** API is shown below. In this example:

- **stCertFile** is the ZL server issued certificate file.
- **stPassword** is the password used to encrypt the certificate.
- **idTenant** is the tenant ID of the ZL server.

```
public class RestAPIClient {
    public static void main(String[] args) {
        Client client = ClientBuilder.newClient();
        WebTarget target = client.target( s: "http://localhost:8080/ps/api/security/getToken");
        String acceptHeader = "*/*";
        String stCert = "wew/1p1XBVQ5/ZcL/N2ebSMVc67XBcX/83IfUd6SeOlTOOD6d02F0+gmPF/" + "KSdtOi8EKODCdOuUscnJHLJ1UcT9a5nLUbYZf0Q3QGFI1/J3
        String stPassword = "GBYQRQPLYYDZZGNCNB4TK0RNWKKM1KRPA";
        int idTenant = -1;
        Form formData = new Form();
        formData.param( name: "certificateBody",stCert);
        formData.param( name: "password",stPassword);
        formData.param( name: "tenant",String.valueOf(idTenant));
        Response response = target.request(MediaType.APPLICATION_FORM_URLENCODED).
                header( s: "Accept",acceptHeader).post(Entity.entity(formData,MediaType.APPLICATION_FORM_URLENCODED_TYPE));
        if (response.getStatus() == 200) {
            // Extract and print the token from the response body
            String token = response.readEntity(String.class);
            System.out.println("Token: " + token);
        } else {
            System.err.println("Error: " + response.getStatus() + ", " + response.readEntity(String.class));
        }
        client.close();
    }
}
```

**Figure 1: getTokenAPI**

You will get the bearer token after calling this API, and you can send this token in headers to authenticate the REST API calls.

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## REST API Java Client Examples

This section shows examples of REST API client implementations.

### Example 1 - GET Operation: Getting File Server Information

```
public class RestAPIClient {
    public static void main(String[] args) {
        Client client = ClientBuilder.newClient();
        WebTarget target = client.target( s: "http://localhost:8080/ps/api/beta/FileServer/getmailserverusingid/{id}")
                .resolveTemplate( s: "id",  o: "52");
        String token = "CZPQIHHMFRCBOB30RXWRR3HT5UXYQ2UMB";
        String response = target.request(MediaType.APPLICATION_JSON).header(HttpHeaders.AUTHORIZATION,  o: "Bearer " + token).
                get(String.class);
        System.out.println(response);
        client.close();
    }
}
```

**Figure 2: Getting File Server Information**

### Example 2 - Post Operation: Creating File Server

In this example, a client is created and a target URL is build. The request includes ZL bearer tokens in the headers which will hit the ZL API.

```
public class RestAPIClient {
    public static void main(String[] args) {
        Client client = ClientBuilder.newClient();
        String token = "CZPQIHHMFRCBOB30RXWRR3HT5UXYQ2UMB";
        String jsonPayload = "{\"serverName\":\"qdsaqdya111\",\"ip\":\"localhost\",\"port\":\"9975\"}";
        Response response = client.target( s: "http://localhost:8080/ps/api/beta/FileServer/createfileserver")
                .request(MediaType.APPLICATION_JSON).header(HttpHeaders.AUTHORIZATION,  o: "Bearer " + token).post(Entity.json(jsonPayload));
        System.out.println(response.toString());
        client.close();
    }
}
```

**Figure 3: Creating File Server**

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## REST API Using Swagger Client

This section shows examples of using the REST API with a Swagger client. Access the Rest API with a Swagger client via the following URL, where “localhost” represents the hostname or IP address of the ZL server:

http://localhost:8080/ps/zlui/app/home/zlswagger.htmlfile

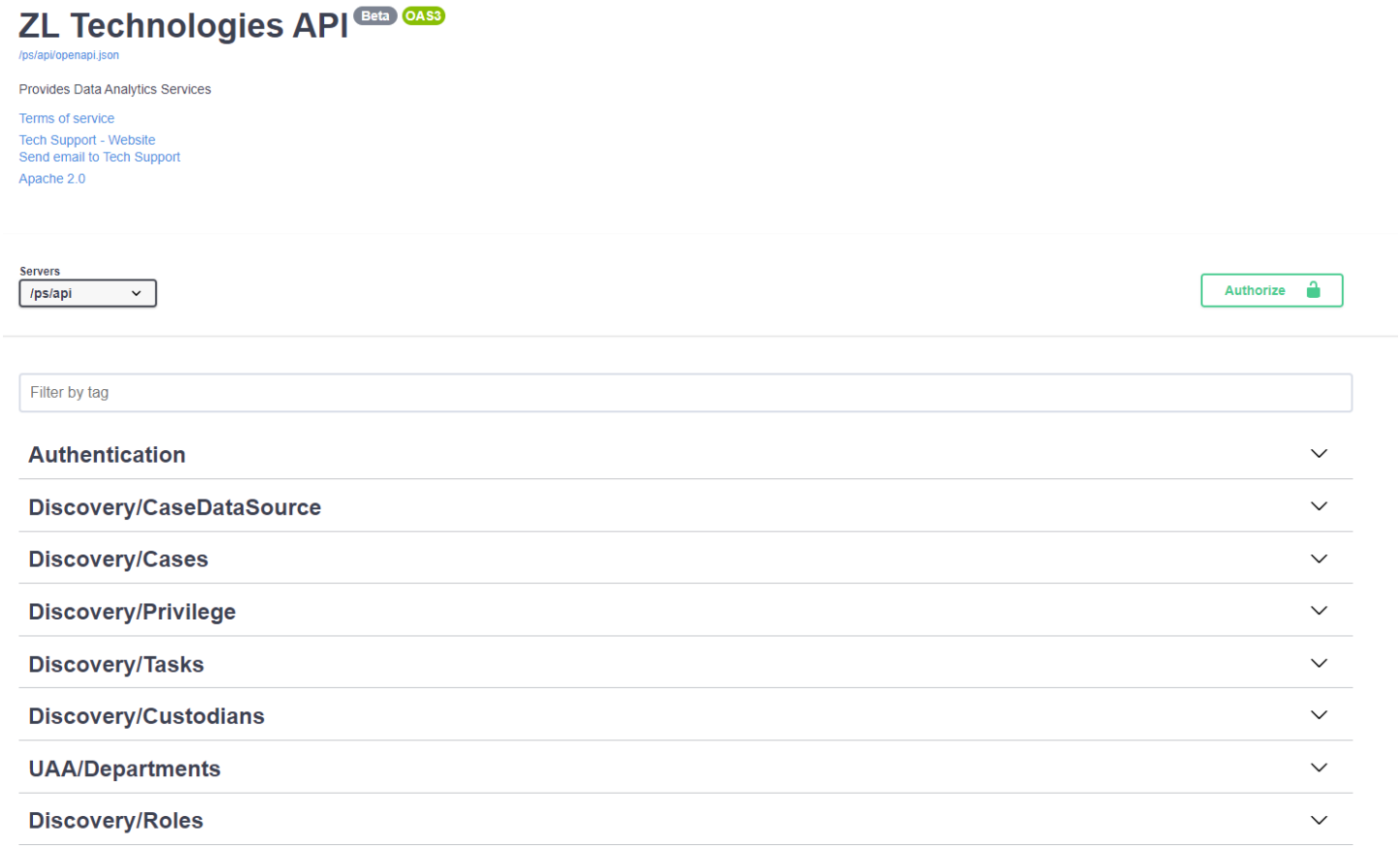


**Figure 4: ZL UA Rest API**

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## Authenticating in Swagger

Before using the REST API in Swagger, you must authenticate using the consumer's certificate, password and tenant identification. After authenticating, a token will be generated. You will need to authorize in swagger using that token. This is shown below.

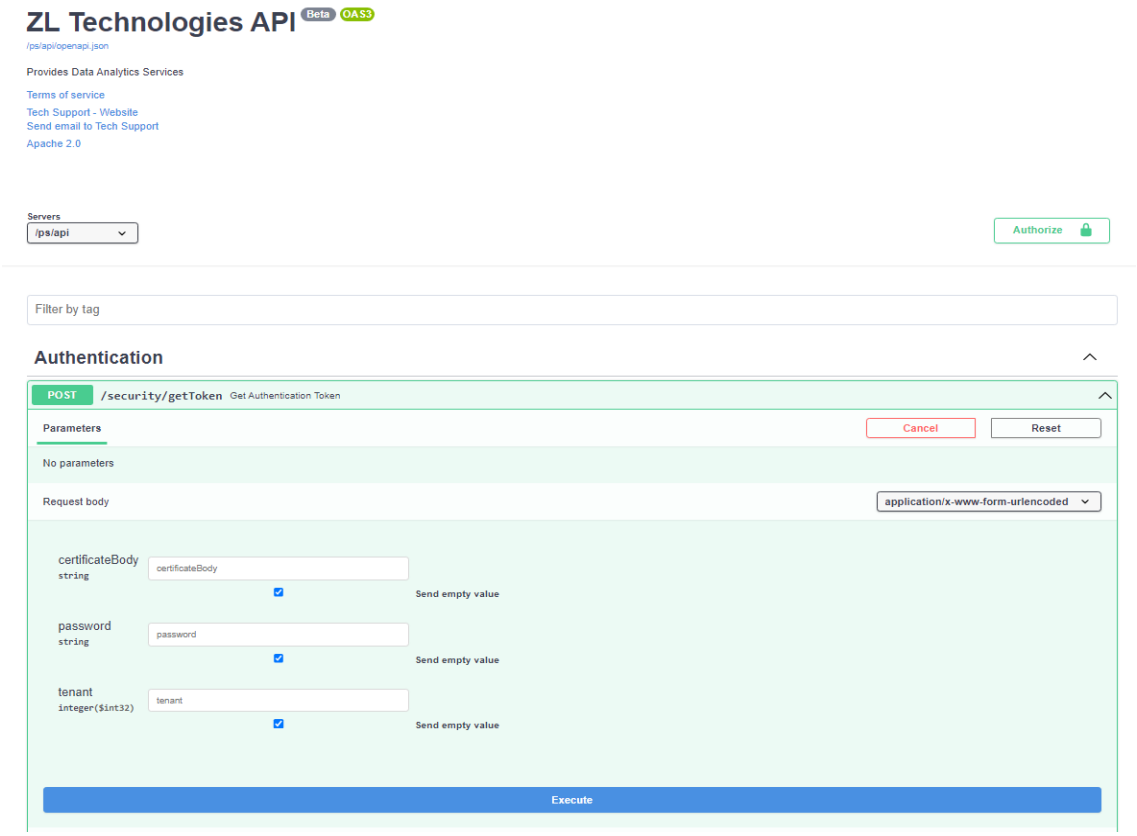


**Figure 5: Authentication**

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### Example 1 - GET Operation: Getting File Server Information

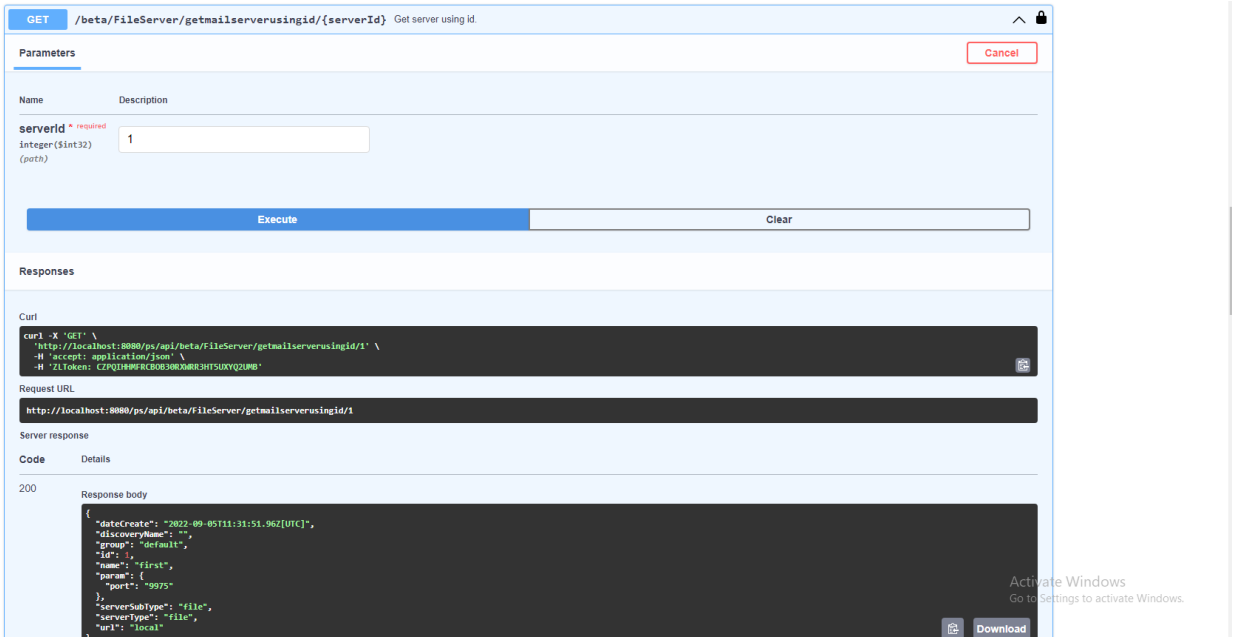


**Figure 6: Getting File Sever Information**

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## Example 2 – POST Operation: Creating File Server

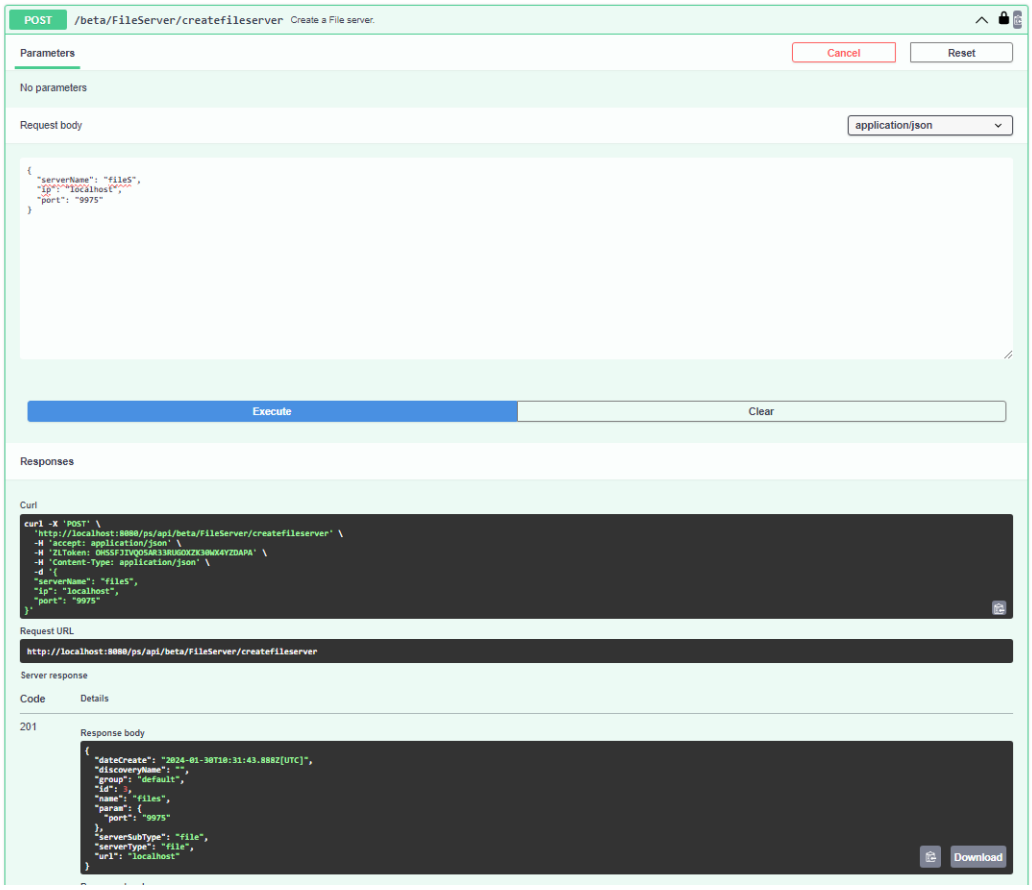


**Figure 7: Creating File Server**

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## REST API Using Postman

REST API calls are authorized using ZL bearer tokens which are sent in the bearer token field in the postman along with the HTTP request. This is shown below.

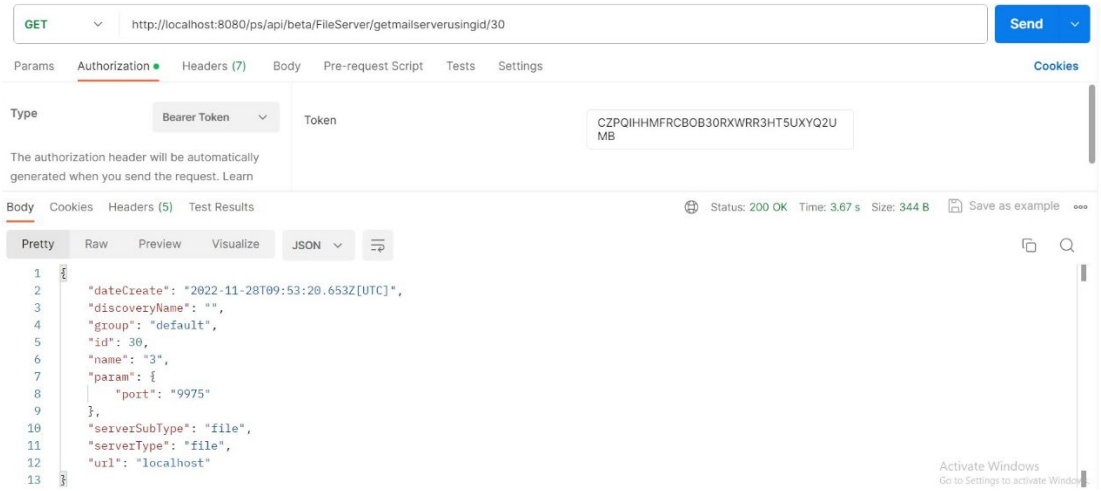


**Figure 8: Example 1 - GET operation: Getting File Server Information**

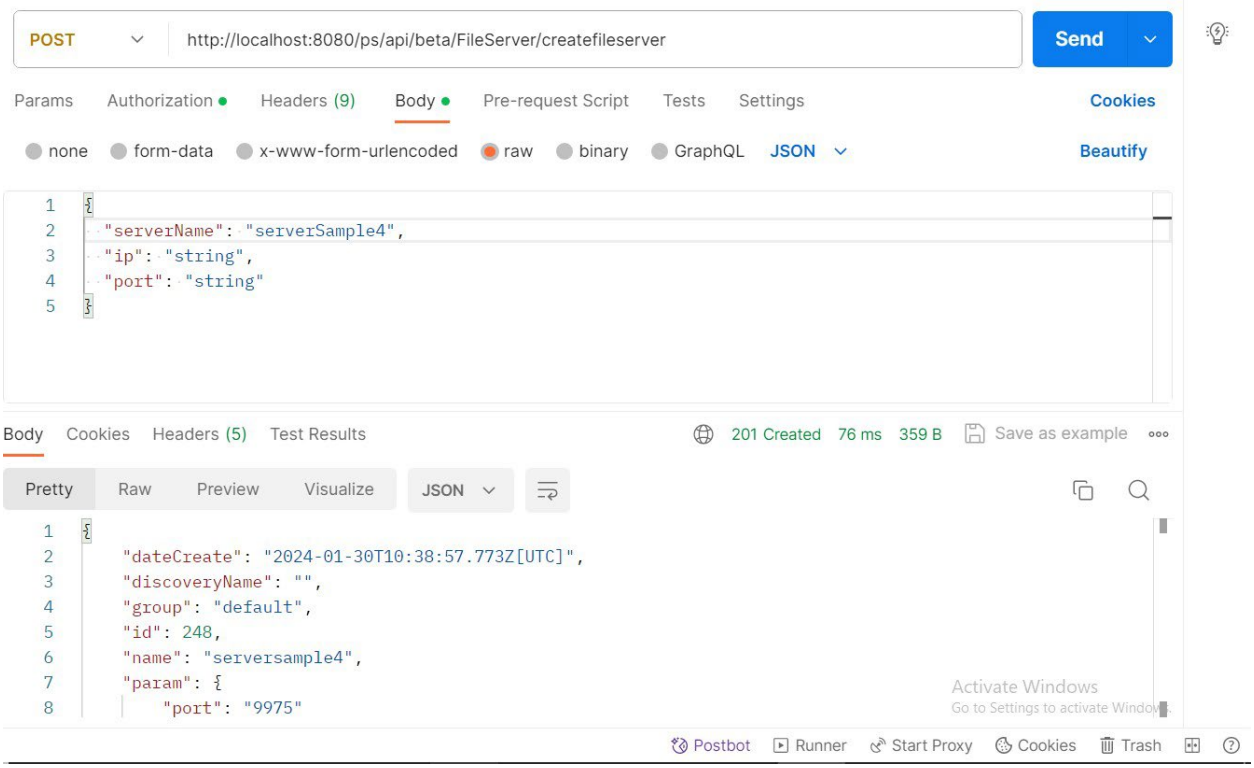


**Figure 9: Example 2 – POST Operation: Creating File Server**

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# REST API Endpoints

Each endpoint includes the following inputs and outputs:

- **Request Parameters:** Input defining the object to be retrieved, created or updated.
- **Request Body Schema Fields:** Input defining the object to be retrieved, created or updated. For example, if you execute an endpoint to configure a File Share project, these fields would define the intended configuration of the project.
- **Response Schema Fields**: Output defining the object that was retrieved, created or updated. For example, if you execute a call to retrieve the configuration of a content rule, the response schema fields would represent that configuration.
- **Response Codes**: A numeric value indicating the result of the operation. The following response codes can be returned by REST API endpoints:

  200: Successful
  206: Partial Content
  400: Bad Request
  401: Unauthorized
  403: Forbidden
  404: Not Found
  406: Not Acceptable
  500: Internal Server Error

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# ZL UA Operations in the REST API

In ZL UA 11.0, endpoints have been provided for the following purposes:

- **Discovery/Case Data Sources:** In the ZL Discovery Manager, you can search archived data and save the results to a particular eDiscovery case as a *collection* or a *preservation.* These saved searches are referred to as *data sources.*

  Use these endpoints to view information regarding the data sources that have been added to a case and to schedule future data source runs. For more information, see *Discovery/CaseDataSource* on page 16.

- **Discovery/Cases:** All the searches, preservation applications, item review, analysis, exports, and other tasks in ZL Discovery Manager occur within cases. Cases are a matter-specific way of organizing documents and managing permissions in one place. ZL Discovery Manager users may have permissions for multiple cases, and a document can be present in more than one case.

  Use these endpoints to create and manage cases, including the tags that are available within the case and the user privileges assigned within the case. For more information, see *Discovery/Cases* on page 26.

- **Discovery/Privileges:** In the ZL Discovery Manager, privileges can also be assigned within each eDiscovery case to grant users access to operations within the case. A user's role may provide access to operations not allowed by his or her privileges - and vice versa - so it is important to remember that each user will have access to all operations allowed by his assigned role(s) and privilege(s).

  Use these endpoints to grant and manage privileges within a case. For more information, see *Discovery/Privileges* on page 62.

- **Discovery/Tasks:** The Discovery Manager includes several background tasks you must execute at different times. For example, after running a search to add data to a case, you must the Run Case Importer background task. This imports the data from any new collections and preservations into the case, updates the case content index (if content indexing is enabled), and builds the parallel index.

  Use these endpoints to execute the different background tasks or view the status of the background tasks. For more information, see *Discovery/Tasks* on page 69.

- **Discovery/Custodians:** Custodians are targets of an eDiscovery investigation who are likely to possess or have knowledge about the location of documents that are pertinent to a case. In ZL Discovery Manager, custodians function as a way in which aliases and email addresses can be associated with an individual to facilitate searches.

  Once an individual has been added as a case custodian, case users can use the custodian as a filter when searching for documents to save to the case, and when searching across documents that have already been saved to the case.

  Use these endpoints to manage custodians within a case. For more information, see *Discovery/Custodians* on page 76.

- **UAA/Departments:** A department is defined by ZL UA as a hierarchical grouping of users. Each user created in ZL UA is grouped into a department that has been added to the system. The structure of the departmental hierarchy configured in ZL UA often resembles the organization's actual departmental structure, but this configuration model is not required.

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Use these endpoints to create and manage departments in ZL UA. For more information, see *UAA/Departments* on page 97.

- **Discovery/Reports**: Use these endpoints to generate various reports containing details on eDiscovery searches, cases and custodians. For more information, see *Discovery/Reports* on page 114.
- **Discovery/Roles:** In the Discovery Manager, a role is an application or department-level set of permissions that determines what users can access and what actions users can perform in the application. All ZL UA roles can be assigned to users by administrators from the Unified Archival Admin (UAA) module, and the eDiscovery-related roles described in this appendix can also be assigned with the Discovery Manager.

  Use these endpoints to grant and manage roles within a case. For more information, see *Discovery/Roles* on page 130.
- **EA/Audits:** Use these endpoints to generate audit trail reports and view audit trail data. Audit trail data lists actions that were taken within the Enterprise Analytics affecting workspaces, searches, tags and more. For more information, refer to *EA/Audits* on page 134.
- **EA/Exports:** Use these endpoints to manage Enterprise Analytics exports. This includes endpoints to start and re-start an export, retrieve export task statuses, and view export-related data*:* For more information, refer to *EA/Exports* on page 141
- **EA/Preservations:** The Enterprise Analytics module includes the preservation workflow, which you can use to save file and message data into preservations and place them on legal hold. Once placed on legal hold, the data cannot be removed from the ZL Vault.

  Use these endpoints to manage the Preservation Workflow. For more information, refer to *EA/Preservation* on page 151.
- **EA/Workspace:** This section describes endpoints you can use to retrieve information regarding Enterprise Analytics workspaces and data sources (i.e., searches, filters and Dataset Manipulations that have been added to a workspace). For more information, refer to *EA/Workspace* on page 153.
- **EA/Search:** This section describes endpoints you can use to delete or retrieve information regarding Enterprise Analytics data sets (i.e., data sources, saved filters and Dataset Manipulations). For more information, refer to *EA/Search* on page 165.
- **EA/Tasks:** Use these endpoints to view Enterprise Analytics export task statuses. For more information, refer to *EA/Tasks* on page 169.
- **EA/Tags:** Tags are customizable labels that can be applied to messages and files in the Enterprise Analytics module for various purposes. For example, you could apply tags to messages and files that are relevant to specific legal matter, or to messages and files that were returned by a search. Tags can be created as global tags that can applied to any workspace when it is created, or as workspace-specific tags that can be applied to a single workspace at any time after its creation.

  Use these endpoints to manage tags. For more information, refer to *EA/Tags* on page 172.
- **EFM/Disposition:** Manage disposition within EFM projects. Disposition is the process by which files whose records management lifecycle has expired are deleted and removed from the ZL UA system.

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Use these endpoints to enable and disable disposition and view disposition status. For more information, refer to *EFM/Disposition* on page 180.

- **EFM/Reports:** Use these endpoints to generate reports summarizing the files that are included in the EFM projects that have been added to your installation. For more information, refer to *EFM/Reports* on page 193.
- **EFM/Tasks:** Use the **Tasks** endpoints to monitor the status of tasks involving the application of Record Categories and Static Tags in the EFM module. For more information, see *EFM/Tasks* on page 196.
- **EFM/Tags:** In ZL UA, tags are customizable labels that can be applied to files. Typically, they have been used to categorize files together for various purposes. The Enterprise Files Management (EFM) module expands the concept of tags by introducing *Record Categories* and *Static Tags*.
  Static Tags are customizable labels that can be used to categorize files into groups. For example, you could create a Static Tag to apply to all files that include certain keywords, or to all files that were created during a specific timeframe. With the EFM module, you can create *content rules* that will dictate which Static Tags are applied to each file.
  A Record Category (also referred to as a Record Category Tag) defines a file's disposition period (i.e., how long it will be retained within ZL UA before being permanently deleted from ZL UA and the source server). When creating Record Categories, you will also need to create retention codes which define the disposition periods in your system.
  Use the **Tags** endpoints to create and manage Record Categories and Static Tags for use with the EFM module. For more information, see *EFM/Tags* on page 198.
- **FAM/Roles**: Assign roles to users. A role is the function of an individual, independent of any conditions. Roles are assigned on either system-wide or departmental levels. A ZL user can be assigned any number of system roles.
  Use these endpoints to grant and revoke user roles for use within the FAM module. For more information, see *FAM/Roles* on page 229.
- **UAA/Data Sources**: To archive any type of data, a reference pointing to its server must be created in the ZL Unified Archival Admin (UAA) application, regardless of the server type (mail, file, SharePoint, etc). This reference - referred to as a ZL UA application server or a content server - integrates ZL UA with the physical server on the corporate network.
  Use these endpoints to create and update mail servers in ZL UA. For more information, see *UAA/Data Sources* on page 232.
- **FAM/Dashboards:** When using the FAM module, it is important to understand the difference between a project and a dashboard. A project is a set of folders and files that has been grouped together. Projects are also used in other ZL UA modules. A dashboard is a set of projects that has been grouped together for analysis within the FAM module.
  Use these endpoints to create and update dashboards for use in the FAM module. For more information, refer to *FAM/Dashboards* on page 266.
- **FAM/Disposition**: Manage disposition within FAM projects. Disposition is the process by which files whose records management lifecycle has expired are deleted and removed from the ZL UA system.

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Use these endpoints to enable and disable disposition and view disposition status. For more information, see *FAM/Disposition* on page 278.

- **FAM/Reports**: Use these endpoints to generate reports containing information relevant to audit trail data, file and folder analysis data, PII date, remediation tasks, and the disposition status of FAM projects. For more information, see *FAM/Reports* on page 286.
- **FAM/Tasks**: The ZL FAM module includes background tasks that must be executed after the completion of certain operations. For example, after creating a project, you would need to execute the **Run Crawl**, **Update Content Index**, **Update Index** and **Clear Cache** background tasks to scan the project directories for files and update the project's content index and tag index.

  Use these endpoints to execute required background tasks on FAM projects. For more information, see *FAM/Tasks* on page 296.
- **UAA/Policies**: ZL UA allows users to create and configure system-wide policies that are used to determine factors such as which files will be ingested into ZL UA during scanning and whether those files will be indexed upon ingestion. When setting up an EFM installation, you will be required to create **File Archiving** and **File In Place** policies.

  Use these endpoints to create and assign policies. For more information, refer to *UAA/Policies* on page 307.
- **FAM/Project Privileges**: Use these endpoints to manage the privileges that have been assigned to users within a FAM project. These privileges determine what operations the users can perform within the project. For more information, see *FAM/Project Privileges* on page 326.
- **UAA/Projects**: A project is essentially a list of folders or sites that is grouped together to be scanned whenever a server is crawled. Projects are created to determine which system directories or sites (and, subsequently, which items) in the selected server are to be archived and/or managed in place.

  Use these endpoints to create and manage projects on various server types. For more information, refer to *UAA Projects* on page 338.
- **UAA/Roles**: An application or department-level set of permissions that determines what users can access and what actions users can perform in the application.

  Roles can be assigned globally, or for a specific department(s). For example, a Global Discovery Manager role would enable the user's assigned role for all cases. A Discover Manager role for a specific department would restrict the user's role to the cases defined within that department. A case's department can be defined during case setup.

  Use these endpoints to grant and revoke roles within the UAA module and ZL UA. For more information, refer to *UAA/Roles* on page 383.
- **FAM/Security Groups**: A security group represents a specific group of users in ZL UA. When you assign project privileges to a security group, those privileges are granted to all users in the security group. Use these endpoints to create and manage security groups. For more information, refer to *FAM/Security Groups* on page 393.

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- **UAA/Agents:** Server agents are components that perform various tasks on the server, such as crawling the server for data or performing user synchronization. Generally, each server added to ZL UA must have at least one server agent.

  Use these endpoints to create and manage server agents. For more information, refer to *UAA/Agents* on page 397.

- **FAM/Projects**: A project represents a collection of folders and directories on a server that is grouped together for use within the FAM module. Use these endpoints to create and manage file projects. Use these endpoints to create and manage projects for use with the FAM module. For more information, see *FAM/Projects* on page 423.

- **FAM/Tags**: Tags are customizable labels that can be applied to documents for various purposes. You could apply tags to the results of a search or file sampling to mark those files for retrieval later or apply tags to mark files that are subject to review, and so on.

  You can also use tags for remediation. When you configure remediation, you assign an action to a tag (e.g., to copy, delete, or move the file). When you execute remediation, that action will be applied to all the files that the tag has been applied to. For example, you could use remediation to move all files that a tag has been applied to from one folder to another.

  You can upload tag definition files and tag specifications into ZL UA to create tags for use in your system. A tag definition file defines and creates tags. These tags can be applied to files manually, or via a tag specification. A tag specification defines a set of rules and conditions, each of which specifies a tag that will be applied to files that meet the terms of the rules and conditions. For example, you could create a tag specification to tag all files that contain the phrase confidential agreement" in the body of an email with the "Privileged" tag. You can upload tag specifications that will tag files based on content, metadata and PII data.

  Use these endpoints to manage tags in REST API and to upload tag definition files and tag specification files. For more information, refer to *FAM/Tags* on page 424.

- **FAM/Task Sets**: The ZL FAM module includes background tasks that must be executed after the completion of certain operations. For example, after creating a project, you would need to execute the **Run Crawl**, **Update Content Index**, **Update Index** and **Clear Cache** background tasks to scan the project directories for files and update the project's content index and tag index.

  You can create task sets to run background tasks simultaneously, on an on-demand basis or at regularly scheduled intervals. Each task set configuration includes a group of background tasks and a list of projects and dashboards that the task set is applicable to. When the task set is executed, all of the background tasks will be executed upon the specified projects and upon all projects included in the specified dashboards. You can create task sets to run background tasks simultaneously, on an on-demand basis or at regularly scheduled intervals. Each task set configuration includes a group of background tasks and a list of projects and dashboards that the task set is applicable to. When the task set is executed, all of the background tasks will be executed upon the specified projects and upon all projects included in the specified dashboards.

  Use these endpoints to create and manage task sets. For more information, refer to *FAM/Task Sets* on page 441.

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- **UAA/Users**: A user is a person whose email address(es) and alias(es) are recognized in the ZL UA system. All users registered in ZL UA are associated with one department. Users can inherit policy settings from their department. However, privileged users can configure custom settings to override the inherited department settings for a particular user. A ZL UA user typically has a primary email address, as well as one or more *alias* email addresses which can be used to locate that user.

  Use these endpoints to create and manage users. For more information, see *UAA/Users* on page 452.

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# Discovery/CaseDataSource

In the ZL Discovery Manager, you can search archived data and save the results to a particular eDiscovery case as a *collection* or a *preservation.* These saved searches are referred to as *data sources.*

When you save the search to the case, you can specify options to automatically re-run the search later. New search results returned during each re-run will be imported into the case after the appropriate background tasks – e.g., the *import task* - are executed. Each future invocation of the search used to create the data source is referred to as a *data source run.*

The following sections describe the Discovery/CaseDataSource endpoints available in the REST API. Use these endpoints to view information regarding the data sources that have been added to a case, the data source runs that have been executed upon a case, and to schedule future data source runs:

- *POST: Create Child Department (createchilddepartment):* View the data source runs that have been executed for a data source.
- *GET: Get Case Data Source Run Schedule (getcasedatasourcerunschedule):* View the data source run schedule for a data source.
- *GET: Get Case Data Source Using Name (getcasedatasourceusingname):* View the details for a data source.
- *GET: Get Latest Case Data Source Run (getlatestcasedatasourcerun):* View the details of the latest data source run executed for a particular data source.
- *POST: Schedule Case Data Source (scheduleDataSource):* Schedule future runs for a data source.
- *DELETE: Unschedule Data Source (unscheduleDataSource):* Remove future run scheduling for a data source.

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## GET: Get All Case Data Source Runs (getallcasedatasourceruns)

Retrieve information for the data source runs that have been executed for a particular data source.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **dataSourceId** | Integer | Specify the ID of the data source you want to view. For information on retrieving data source IDs, refer to *GET: Get Case Data Source Using Name (getcasedatasourceusingname) on page 21*. |
| **page**<br>**pageSIze** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Data Source Run Entries:** The endpoint returns an entry for each run that has been executed for the specified data source. The following information is included for each run: | | |
| **id** | Integer | The data source run ID. |
| **caseDataSourceId** | Integer | The ID of the data source. |
| **caseId** | Integer | The ID of the case the data source run belongs to. |

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| Schema Field | Type | Description |
|---|---|---|
| **status** | Integer | The status of the data source run:<br>0: STATUS NONE<br>10: STATUS SEARCH INITIATED<br>499: STATUS SEARCH DONE ERROR<br>500: STATUS SEARCH DONE<br>502: STATUS INPLACE ITEM RENCONCILE<br>504: STATUS INPLACE ITEM ARCHIVE<br>510: STATUS IMPORT INITIATED<br>999: STATUS IMPORT DONE_ERROR<br>1000: STATUS IMPORT DONE<br>1001: STATUS SEARCH ABORT<br>1002: STATUS IMPORT ABORT<br>1003: STATUS OTHER ABORT |
| **searchPID** | String | The PID assigned to the data source run. |
| **dateSearchStart** | String | The date/times that the data source run started, was last updated and ended. When creating a data source run, the date the search started will march the date it was last updated. |
| **dateSearchUpdate** | String | |
| **dateSearchEnd** | String | |
| **searchItemCount** | String | The number of items returned by the search. |
| **searchStatusMsg** | String | The status of the search. |
| **importPID** | String | The process ID of the session. This is the hostname of the machine on which the search is running. |
| **importStartDate** | String | The date/time that the import task for the case began and ended. New data discovered during the search is added to the case when the import task is executed. |
| **importUpdate** | String | |
| **importEndDate** | String | |
| **newCaseItemCount** | Integer | The number of items included in the case after the data source run was executed and the newly discovered items were added to the case. |
| **newCaseItemReferenceCount** | Integer | Total case items that already exist in the case due to other searches/data sources. |

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| Schema Field | Type | Description |
|---|---|---|
| **previousCount** | Integer | The number of items included in the case before the data source run was executed. |
| **errorCount** | Integer | The number of errors that occurred during the import task. |
| **importStatusMsg** | String | The status of the import task. |

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## GET: Get Case Data Source Run Schedule (getcasedatasourcerunschedule)

Retrieve the scheduling information configured for future runs of a data source.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **dataSourceId** | Integer | Specify the ID of the data source you want to view. Scheduling information for this data source will be retrieved. For information on retrieving data source IDs, refer to *GET: Get Case Data Source Using Name (getcasedatasourceusingname) on page 21*. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **dataSourceId** | Integer | The data source ID. |
| **dateStart** | String | The date and time that the data source run schedule began. |
| **intervalMs** | Integer | The run interval, in milliseconds. The search will be re-run at this interval during the date range specified by the **dataStart** and **dateExpiry.** |
| **dateExpiry** | String | The date and time that the data source run schedule ends. |

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## GET: Get Case Data Source Using Name (getcasedatasourceusingname)

Retrieve information for a data source that has been added to a particular case. Specify the data source by its name.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case containing the data source you want to view. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **dataSourceName** | String | Specify the name of the data source you want to view. This is the name assigned to the search when it was initially created in Discovery Manager. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The data source ID. |
| **caseId** | Integer | The ID of the case the data source run belongs to. |
| **name** | String | The internal name assigned to the data source. |
| **displayName** | String | The display name assigned to the data source. |
| **createDate** | String | The date and time the data source was created. |
| **parentId** | Integer | If the data source is a copy, this represents the ID of the parent data source. This defaults to -1 otherwise. |
| **searchStoreId** | Integer | The ID of the search store that was used for the search (i.e., the store that was searched). |
| **purpose** | String | The purpose of the data source. |
| **dataSourceType** | String | The type of data source. |
| **lastUpdate** | String | The date/time the data source was last updated. |

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## GET: Get Latest Case Data Source Run (getlatestcasedatasourcerun)

Retrieve information for the most recent run that has been executed for a particular data source.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **dataSourceId** | Integer | Specify the ID of the data source you want to view. Information for the most recent data source run for this source will be returned. For information on retrieving data source IDs, refer to *GET: Get Case Data Source Using Name (getcasedatasourceusingname) on page 21*. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The data source run ID. |
| **caseDataSourceId** | Integer | The ID of the data source. |
| **caseId** | Integer | The ID of the case the data source run belongs to. |
| **status** | Integer | The status of the data source run. |
| **searchPID** | String | The PID assigned to the data source run. |
| **dateSearchStart** | String | The date/times that the data source run started, was last updated and ended. When creating a data source run, the date the search started will march the date it was last updated. |
| **dateSearchUpdate** | String | |
| **dateSearchEnd** | String | |
| **searchItemCount** | String | The number of items returned by the search. |
| **searchStatusMsg** | String | The status of the search. |
| **importPID** | String | The process ID of the session. This is the hostname of the machine on which the search is running. |
| **importStartDate** | String | |

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| Schema Field | Type | Description |
|---|---|---|
| **importUpdate** | String | The date/time that the import task for the case began and ended. New data discovered during the search is added to the case when the import task is executed. |
| **importEndDate** | String | |
| **newCaseItemCount** | Integer | The number of items included in the case after the data source run was executed and the newly discovered items were added to the case. |
| **newCaseItemReferenceCount** | Integer | Total case items that already exist in the case due to other searches/data sources. |
| **previousCount** | Integer | The number of items included in the case before the data source run was executed. |
| **errorCount** | Integer | The number of errors that occurred during the import task. |
| **importStatusMsg** | String | The status of the import task. |

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## POST: Schedule Case Data Source (scheduleDataSource)

Configure the scheduling options for future runs of a particular data source.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **dataSourceId** | Integer | Specify the ID of the data source to be scheduled. For information on retrieving data source IDs, refer to *GET: Get Case Data Source Using Name (getcasedatasourceusingname) on page 21*. |
| **dateStart** | String | The date and time to begin the data source runs. |
| **intervalMs** | Integer | The run interval, in milliseconds. The search will be re-run at this interval during the date range specified by the **dataStart** and **dateExpiry.** |
| **dateExpiry** | String | The date and time to end the data source runs. |

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **dataSourceId** | Integer | The ID of the data source that has been scheduled. |
| **dateStart** | String | The date and time that the future data source runs will begin. |
| **intervalMs** | Integer | The run interval, in milliseconds. The search will be re-run at this interval during the date range specified by the **dataStart** and **dateExpiry.** |
| **dateExpiry** | String | The date and time to end that the future data source runs will end. |

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## DELETE: Unschedule Data Source (unscheduleDataSource)

Delete the scheduling for a data source, so that no further runs are executed for the data source.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **dataSourceId** | Integer | Specify the ID of the data source to be updated. For information on retrieving data source IDs, refer to *GET: Get Case Data Source Using Name (getcasedatasourceusingname) on page 21*. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the scheduling was deleted successfully.

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# Discovery/Cases

All the searches, preservation applications, item review, analysis, exports, and other tasks in ZL Discovery Manager occur within cases. Cases are a matter-specific way of organizing documents and managing permissions in one place. ZL Discovery Manager users may have permissions for multiple cases, and a document can be present in more than one case.

You can search archived data and save the results to a particular eDiscovery case as a *collection* or a *preservation.* These saved searches are referred to as *data sources* within the case. After a file or email message has been added to a case, you can apply tags to those files. Tags are a way to mark files or emails that include keywords and phrases that are considered particularly important to a particular case.

The following sections describe the Discovery/Cases endpoints available in the REST API. Use these endpoints to create and manage cases, including the tags that are available within the case and the user privileges assigned within the case:

- *POST: Create a Tag (addtag)*
- *PUT: Apply Case Tags (applyCaseTags)*
- *POST: Create a Case (createcase)*
- *POST: Create a Custodian Legal Hold (createCustodianLegalHold)*
- *DELETE: Delete Case (deleteCase)*
- *DELETE: Delete Tag (deleteTag)*
- *GET: Get All Case Data Sources (getallcasedatasources)*
- *GET: Get Case Info (getallcaseusingname)*
- *GET: Get Case Info (getallcaseusingnamepattern)*
- *GET: Get All Case Tags (getallcasetags)*
- *GET: Get All Case User Privileges (getallcaseuserprivileges)*
- *GET: Get All Child Tags (getallchildtags)*
- *GET: Get All Cases Using Domain ID (getAllCasesUsingDomain)*
- *GET: Get List of All Schema (getAllSchema)*
- *GET: Get Case Data Source Using ID (getcasedatasourceusingsrcid)*
- *GET: Get Case Using ID (getcaseusingid)*
- *GET: Get Case Item (getcaseitem)*
- *GET: Get Case Schema Using Case ID and Field Item Schema (getCaseSchema)*
- *GET: Get Case Schema Metadata (GetCaseSchemaMetaData)*
- *PUT: Update Case Item Schema (updatecaseitemschema)*

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- *PUT: Update Case Schema (updatecaseschema)*
- *PUT: Update Case Schema Metadata (updateCaseSchemaMetaData)*
- *PUT: Update Tag (updatetag)*

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## POST: Create a Tag (addtag)

You can apply tags to files or emails that include keywords and phrases that are considered particularly important to an eDiscovery case. Use this endpoint to add a tag to a case so that it can be applied to documents within the case.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **tagName** | String | The name of the tag. |
| **tagDescription** | String | A description of the tag. |
| **caseId** | Integer | The ID of the case the tag should be added to. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **parentTagId** | Integer | The ID of the parent tag that the new tag will be grouped under in the tag hierarchy. For information on obtaining tag IDs, refer to *GET: Get All Case Tags (getallcasetags)* on page 43. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **parent** | String | The name of the tag's parent tag. |
| **id** | Integer | The tag ID. |
| **caseId** | Integer | The ID of the case the tag belongs to. |
| **parentId** | Integer | The ID of the tag's parent tag. |
| **name** | String | The internal name of the tag. |
| **displayName** | String | The display name of the tag. |

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| Schema Field | Type | Description |
|---|---|---|
| **tagFlags** | Array | An array of Boolean values indicating the status of various tag attributes. |
| **root_node** | Boolean | Indicates the tag is the root tag. |
| **read_only** | Boolean | Indicates the tag is read-only. |
| **enduser_tag** | Boolean | Indicates that the tag can be applied manually. |
| **auto_tag** | Boolean | Indicates that the tag can be applied automatically, i.e., via a tag specification file. |
| **max_tag** | Boolean | Indicates the tag is a mutually exclusive tag. |
| **tag_32** | Boolean | Indicates the tag is a PII tag. |
| **tag_64** | Boolean | Indicates the tag is a content tag. |
| **description** | String | A description of the tag. |
| **createDate** | String | The date and time that the tag was created. |

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## PUT: Apply Case Tags (applyCaseTags)

Apply tags to a case item.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case containing the item you want to apply tags to. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **caseItemId** | Integer | Specify the ID of the case item you want to apply tags to. You can extract case item IDs from the **CaseItem** database table. |
| **tagIds** | Integer | An array of tag IDs to specify the tags you want to apply to the case item. Specify the tag IDs as a comma-separated list. For example:<br>`"tagIds": [ 0,1,2,3 ]`<br>For information on obtaining tag IDs, refer to *GET: Get All Case Tags (getallcasetags)* on page 43. |

### Response Schema Fields

A string indicating whether the tags were applied successfully.

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## POST: Create a Case (createcase)

Create a new case.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **idDept** | Integer | Specify the case department. This field allows you to limit access to the case to privileges with ZL Discovery Manager roles with the proper department scope. If a case's department falls outside of the department scope of a ZL Discovery Manager privilege's role, he/she will not be able to view or access the case (unless granted additional case level privileges). |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **name** | String | Enter the name of the case. |
| **docketNumber** | String | Enter the case's docket number. |
| **jurisdiction** | String | Enter any notes concerning the case's jurisdiction. |
| **category** | Integer | Specify a case category to label the type of case. This option does not affect behavior of the application; it is for informational purposes only:<br>• 1: GENERAL LITIGATION<br>• 2: ANTITRUST<br>• 3: LABOR AND EMPLOYMENT<br>• 4: BREACH OF CONTRACT<br>• 5: IP/PATENT<br>• 6: REAL ESTATE<br>• 7: GOVERNMENT INVESTIGATION<br>• 8: INTERNAL MATTER |
| **state** | Integer | Specify the current state of the case. This field value does not affect the behavior of the case; it is for informational purposes only. |
| **fileDate** | String | Specify the filing date for the case. |

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| Schema Field | Type | Description |
|---|---|---|
| **caseDescription** | String | Enter a description of the case. |
| **preservation** | Boolean | If set to True, documents can be saved to the case through custodian preservation or ECA search without creating a collection for review and analysis. |
| **collection** | Boolean | If set to True, documents can be saved to the case for further review and analysis. The items need not be part of a preservation, as items within a collection are also preserved automatically. |
| **enableContentIndex** | Boolean | If set to True, a content index for documents collected in the case can be built, enabling content-based searching of collected items. |
| **exportWorkflow** | Boolean | Set to True to mandate that any case item export requests be approved by administrative users before the case items are successfully exported in the specified format. Set to False to allow users with export permissions to export case items immediately without a required approval process. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The case ID. |
| **name** | String | The name of the case. |
| **displayName** | String | The display name of the case. |
| **createDate** | String | The date and time the case was created. |
| **fileDate** | String | The file date specified for the case, |
| **lastUpdate** | String | The date and time the case was last updated, |
| **state** | Integer | The current state of the case. |
| **ownerZlpUserId** | Integer | The ZLP user ID of the user who created the case. |
| **journalDomainId** | Integer | The journal domain ID of the ZL department associated with the case. |
| **docketNumber** | String | The case’s docket number. |

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| Schema Field | Type | Description |
|---|---|---|
| **jurisdiction** | String | Any notes concerning the case's jurisdiction. |
| **category** | Integer | The category applied to the case. |
| **caseDescription** | String | A description of the case. |
| **preservation** | Boolean | If set to True, documents can be saved to the case through custodian preservation or ECA search without creating a collection for review and analysis. |
| **collection** | Boolean | If set to True, documents can be saved to the case for further review and analysis. The items need not be part of a preservation, as items within a collection are also preserved automatically. |
| **enableContentIndex** | Boolean | If set to True, a content index for documents collected in the case can be built, enabling content-based searching of collected items. |
| **exportWorkflow** | Boolean | If Set to True, any case item export requests must be approved by administrative users before the case items are successfully exported in the specified format. |

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## POST: Create a Custodian Legal Hold (createCustodianLegalHold)

Add a custodian to a case. You can add a user that has already been added to ZL UA, or you can add a new user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **idCase** | Integer | Specify the ID of the case the custodian(s) should be added to. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **custodianIds** | Integer | An array of ZLP user IDs identifying the custodians who should be added to the case. Specify the user IDs as a comma-separated list. For example:<br>`"custodianIds": [ 0,1,2,3 ]`<br>The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |

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| Parameter | Type | Description |
|---|---|---|
| **srchStoreIds** | Integer | An array of search store IDs to specify the search stores which include data for the custodians. Specify the user IDs as a comma-separated list. For example:<br>`"srchStoreIds": [ 0,1,2,3 ]`<br>You can extract search store IDs from the **SearchStore** database table. |
| **datePreservationBegin**<br>**datePreservationEnd** | String | These fields specify the date range for the preservation. Messages sent to - or received by - the custodian during this date range will be added to the preservation. |
| **dateFuturePreservationEnd** | String | If **isFuturePreservationEnabled** is set to True, specify the end date at which future messages for the custodian will be sent. |
| **isFuturePreservationEnabled** | Boolean | If set to True, any messages ingested into ZL UA going forward that are sent to – or received by – this custodian will be put on legal hold and saved to the case during processing. Use the **dateFuturePreservationEnd** field to specify the date at which future messages will no longer be placed on legal hold and saved to the case. |
| **isRunSearchImportEnabled** | Boolean | Set to True when future preservations are enabled to import the future messages into the specified case. |
| **notes** | String | Additional information about the preservation. |

## Response Schema Fields

The response schema includes the following information for each custodian who was added to the case.

| Parameter | Type | Description |
|---|---|---|
| **Custodian Entries:** The response includes an entry for each user that was added as a custodian. Each entry includes the following fields: | | |
| **id** | Integer | the ZLP user ID of the custodian. |
| **caseId** | Integer | The ID of the case the custodian(s) was added to. |

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| Parameter | Type | Description |
|---|---|---|
| **custodianId** | Integer | The custodian ID assigned to the user. |
| **dataSourceId** | Integer | The ID of the search store used to find data for the custodian. |
| **createDate** | String | The date and time the custodian was added to the case. |
| **searchQueryBeginDate**<br>**searchQueryEndDate** | String | These fields indicate the date range for the preservation. Messages sent to - or received by - the custodian during this date range are added to the preservation. |
| **isFutureEnabled** | Boolean | If set to True, any messages ingested into ZL UA going forward that are sent to – or received by – this custodian will be put on legal hold and saved to the case during processing. |
| **endDate** | String | The end date at which future messages for the custodian will no longer be placed on legal hold. |
| **Notes** | String | Additional information about the custodian. |

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## DELETE: Delete Case (deleteCase)

Delete a case. Specify the case to be deleted by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case to be deleted. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the case was deleted successfully.

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## DELETE: Delete Tag (deleteTag)

Delete a tag from a case. Specify the tag to be deleted by its tag ID and the ID of the case it belongs to.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **tagId** | Integer | Specify the ID of the tag to be deleted. For information on obtaining tag IDs, refer to *GET: Get All Case Tags (getallcasetags)* on page 43. |
| **caseId** | Integer | Specify the ID of the case containing the tag to be deleted. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the case was deleted successfully.

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## GET: Get All Case Data Sources (getallcasedatasources)

Retrieve information for the data sources that have been added to a particular case. Specify the case by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case whose data sources you want to view. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Data Source Entries:** The response includes an entry for each data source included in the specified case. Each entry includes the following fields: | | |
| **id** | Integer | The data source ID. |
| **caseId** | Integer | The ID of the case the data source run belongs to. |
| **name** | String | The internal name assigned to the data source. |
| **displayName** | String | The display name assigned to the data source. |
| **createDate** | String | The date and time the data source was created. |
| **parentId** | Integer | Reserved. This will be set to -1 for all data sources. |
| **searchStoreId** | Integer | The ID of the search store that was used for the search (i.e., the store that was searched). |

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| Schema Field | Type | Description |
|---|---|---|
| **purpose** | String | The purpose of the data source. |
| **dataSourceType** | String | The type of data source. |
| **lastUpdate** | String | The date/time the data source was last updated. |

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## GET: Get Case Info (getallcaseusingname)

Retrieve the configuration of a case. Specify the case by its name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseName** | String | The name of the case you want to view. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The case ID. |
| **name** | String | The name of the case. |
| **displayName** | String | The display name of the case. |
| **createDate** | String | The date and time the case was created. |
| **fileDate** | String | The file date specified for the case, |
| **lastUpdate** | String | The date and time the case was last updated, |
| **state** | Integer | The current state of the case. |
| **ownerZlpUserId** | Integer | The ZLP user ID of the user who created the case. |
| **journalDomainId** | Integer | The journal domain ID of the ZL department associated with the case. |

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## GET: Get Case Info (getallcaseusingnamepattern)

Retrieve the configuration of a case by searching for its name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **namePattern** | String | Enter the search pattern. The search will return information for cases whose name includes or is similar to the search pattern. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The case ID. |
| **name** | String | The name of the case. |
| **displayName** | String | The display name of the case. |
| **createDate** | String | The date and time the case was created. |
| **fileDate** | String | The file date specified for the case, |
| **lastUpdate** | String | The date and time the case was last updated, |
| **state** | Integer | The current state of the case. |
| **ownerZlpUserId** | Integer | The ZLP user ID of the user who created the case. |
| **journalDomainId** | Integer | The journal domain ID of the ZL department associated with the case. |

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## GET: Get All Case Tags (getallcasetags)

Retrieve information for the tags that have been added to a case.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | The ID of the case containing the tags you want to view. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **stTagPurpose** | String | Specify the purpose of the tags you want to view (e.g., Review, AutoProcess, etc). The endpoint will return information for the selected tag and the child tags that have been added beneath it. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The tag ID. |
| **caseId** | Integer | The ID of the case that the tag belongs to. |
| **name** | String | The internal name of the tag. |
| **displayName** | String | The display name of the tag. |
| **tagFlags** | Array | An array of Boolean values indicating the status of various tag attributes. |
| **root_node** | Boolean | Indicates the tag is the root tag. |
| **read_only** | Boolean | Indicates the tag is read-only. |
| **enduser_tag** | Boolean | Indicates that the tag can be applied manually. |
| **auto_tag** | Boolean | Indicates that the tag can be applied automatically, i.e., via a tag specification file. |
| **max_tag** | Boolean | Indicates the tag is a mutually exclusive tag. |

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| Schema Field | Type | Description |
|---|---|---|
| **tag_32** | Boolean | Indicates the tag is a PII tag. |
| **tag_64** | Boolean | Indicates the tag is a content tag. |
| **description** | String | A description of the tag. |
| **childTags:** Includes an entry for each child tag that has been added beneath the specified tag. Each entry includes the following information: | | |
| **id** | Integer | The child tag ID. |
| **parentId** | Integer | The ID of the tag's parent tag. |
| **contextId** | Intger | The ID of the case the tag belongs to. |
| **name** | String | The internal name of the child tag. |
| **displayName** | String | The display name of the child tag. |
| **flags** | Array | An array of Boolean values indicating the status of various attributes for the child tag. |
| **root_node** | Boolean | Indicates the child tag is the root tag. |
| **read_only** | Boolean | Indicates the child tag is read-only. |
| **enduser_tag** | Boolean | Indicates that the child tag can be applied manually. |
| **auto_tag** | Boolean | Indicates that the child tag can be applied automatically, i.e., via a tag specification file. |
| **max_tag** | Boolean | Indicates the child tag is a mutually exclusive tag. |
| **tag_32** | Boolean | Indicates the child tag is a PII tag. |
| **tag_64** | Boolean | Indicates the child tag is a content tag. |
| **description** | String | A description of the child tag. |
| **createDate** | String | The date and time that the child tag was created. |

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## GET: Get All Case User Privileges (getallcaseuserprivileges)

Retrieve information for the user privileges that have been assigned within a particular case. Specify the case by its ID.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case whose user privileges you want to view. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **User:** The response includes an entry for user that has access to the specified case. Each entry includes the following fields: | | |
| **zlpUserID** | Integer | The ZLP ID of the user. |
| **fullName** | String | The name of the user. |
| **emailAddress** | String | The user's primary email address. |
| **privileges** | Array | An array of Boolean values indicating which privileges the user has been assigned. |
| **reviewPrivileges** | Boolean | If True, the user has permission to browse, search, and take action - e.g., tag, export, remove legal hold - on documents collected or preserved in the case. |

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| Schema Field | Type | Description |
|---|---|---|
| **searchesPrivileges** | Boolean | If True, the user has permission to search the contents of the case. |
| **caseManagerPrivileges** | Boolean | If True, the user has permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes. This also includes Permission to browse, search, and take action - e.g., tag, export, remove legal hold- on documents collected or preserved in the case. |
| **administratorPrivileges** | Boolean | If True, the user has Permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes. |

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## GET: Get All Child Tags (getallchildtags)

Retrieve information for the child tags that have been beneath a parent tag. Specify the parent tag by its tag ID and case ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | The ID of the case that the tags you want to view were added to. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **parentId** | Integer | The ID of the parent tag. The endpoint return information for the child tags that have been added beneath this tag. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Child Tag Entries:** Includes an entry for each child tag that has been added beneath the specified tag. Each entry includes the following information: | | |
| **id** | Integer | The tag ID. |
| **parentId** | Integer | The ID of the tag's parent tag. |
| **contextId** | Intger | The ID of the case the tag belongs to. |
| **name** | String | The internal name of the tag. |
| **displayName** | String | The display name of the tag. |
| **flags** | Array | An array of Boolean values indicating the status of various tag attributes. |
| **root_node** | Boolean | Indicates the tag is the root tag. |
| **read_only** | Boolean | Indicates the tag is read-only. |
| **enduser_tag** | Boolean | Indicates that the tag can be applied manually. |

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| Schema Field | Type | Description |
|---|---|---|
| **auto_tag** | Boolean | Indicates that the tag can be applied automatically, i.e., via a tag specification file. |
| **max_tag** | Boolean | Indicates the tag is a mutually exclusive tag. |
| **tag_32** | Boolean | Indicates the tag is a PII tag. |
| **tag_64** | Boolean | Indicates the tag is a content tag. |
| **description** | String | A description of the tag. |
| **createDate** | String | The date and time that the tag was created. |

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## GET: Get All Cases Using Domain ID (getAllCasesUsingDomain)

Retrieve the configurations of cases that belong to a specific domain.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **idDomain** | Integer | Specify a domain ID. Information for cases which are assigned to departments that belong to this domain will be returned. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Case Entries:** Includes an entry for each case that belongs to the specified domain. Each entry includes the following information: | | |
| **id** | Integer | The case ID. |
| **name** | String | The name of the case. |
| **displayName** | String | The display name of the case. |
| **createDate** | String | The date and time the case was created. |
| **fileDate** | String | The file date specified for the case, |
| **lastUpdate** | String | The date and time the case was last updated, |
| **state** | Integer | The current state of the case. |
| **ownerZlpUserId** | Integer | The ZLP user ID of the user who created the case. |
| **journalDomainId** | Integer | The journal domain ID of the ZL department associated with the case. |

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## GET: Get List of All Schema (getAllSchema)

Retrieve a list of all metadata schema that has been added. Custom metadata schemas help organizations add and track important information about the cases created and the items saved to cases in ZL Discovery Manager. By defining company-specific metadata fields within configured schemas, administrative users can allow privileged users to specify additional information for cases and for individual case items. These fields may be constructed for text inputs, dates, select boxes, combo boxes, check boxes, radio buttons, and multi-select boxes.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **SchemaName** | String | The name of the schema. |
| **Schema Fields List:** The response includes an entry for each schema field that has been added. Each entry includes the following fields: | | |
| **FieldName** | String | The name of the field. |
| **FieldType** | String | The data type of the field. |
| **Description** | String | A description of the field. |
| **InputType** | String | The field's input type (Text, Password, Radiobox, Checkbox, Textarea, etc). |
| **Mandatory** | Boolean | Indicates whether the field is mandatory (True) or not. |

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## GET: Get Case Data Source Using ID (getcasedatasourceusingsrcid)

Retrieve information for a data source that has been added to a particular case. Specify the data source by its ID.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **srcId** | Integer | Specify the ID of the data sources you want to view. For information on obtaining data source IDs, refer to *GET: Get All Case Data Sources (getallcasedatasources)* on page 39. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The data source ID. |
| **caseId** | Integer | The ID of the case the data source run belongs to. |
| **name** | String | The internal name assigned to the data source. |
| **displayName** | String | The display name assigned to the data source. |
| **createDate** | String | The date and time the data source was created. |
| **parentId** | Integer | Reserved. This will be set to -1 for all data sources. |
| **searchStoreId** | Integer | The ID of the search store that was used for the search (i.e., the store that was searched). |
| **purpose** | String | The purpose of the data source. |
| **dataSourceType** | String | The type of data source. |
| **lastUpdate** | String | The date/time the data source was last updated. |

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## GET: Get Case Using ID (getcaseusingid)

Retrieve the configuration of a case. Specify the case by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Enter the case ID. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The case ID. |
| **name** | String | The name of the case. |
| **displayName** | String | The display name of the case. |
| **createDate** | String | The date and time the case was created. |
| **fileDate** | String | The file date specified for the case, |
| **lastUpdate** | String | The date and time the case was last updated, |
| **state** | Integer | The current state of the case. |
| **ownerZlpUserId** | Integer | The ZLP user ID of the user who created the case. |
| **journalDomainId** | Integer | The journal domain ID of the ZL department associated with the case. |

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## GET: Get Case Item (getcaseitem)

Retrieve information for an item that has been added to a case. Specify the case and case item by their ID values.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Enter the case ID. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **caseItemId** | Integer | Enter the case item ID. Specify the ID of the case item you want to retrieve information for. You can extract case item IDs from the **CaseItem** database table. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The case item ID. |
| **caseId** | Integer | The case ID. |
| **type** | String | The type of item. |
| **referenceItemId** | String | The reference ID of the case item. |
| **subject** | String | If the item is an e-mail message, this is the e-mail message's subject. If the item is a file, this is the file name. |
| **flags** | | |
| **long** | Integer | Reserved. This value is calculated based on the settings of the **allFlagDesc** field. |

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| Schema Field | Type | Description |
|---|---|---|
| **allFlagDesc** | String | Information regarding the status of the case item:<br><br>SEEN: “cif_seen”<br>AUDITOR SEEN: “cif_auditor_seen”<br>HAS ATTACHMENT: “cif_has_attachment”<br>ATTACHMENT NOT SCANNED: “cif_attachment_not_scanned”<br>LEGAL HOLD: “cif_legal_hold”<br>TRUNCATED TEXT CONTENT: “cif_truncated_text_content”<br>REDACTION: “cif_redaction”<br>HAS NOTEXT: “cif_hasnotext”<br>SCAN ERROR: “cif_scanerror”<br>POLICY BASED SCAN IGNORE: “cif_policybasedscanignore”<br>NOT YET CONTENT INDEXED: “cif_notyetcontentindexed”<br>REQUIRE FED TRANSPORT: “cif_requireFedTransport” |
| **size** | Integer | The size of the item, in bytes. |
| **dateCreate** | String | The date and time the item was created. |
| **dateUpdate** | String | The date and time the item was last updated, |
| **dateImport** | String | The date and time the item was imported into ZL UA. |
| **tagId** | Integer | A list of tag IDs. These are the tags that have been applied to the item. |
| **runIds** | Integer | A list of data source run IDs. These are the data source runs where the item was found in the search. |
| **srcIds** | Integer | A list of data source IDs. These are the data sources that include the item. |
| **tagType** | Integer | This value indicates the tag status of the case item:<br>• 0: No tag.<br>• 1: Non-responsive<br>• 2: Responsive<br>• 3: Privileged<br>• 4: Exclusion |

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## GET: Get Case Schema Using Case ID and Field Item Schema (getCaseSchema)

Retrieve schema information that has been added to a case. Specify the schema by its case ID value.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Enter the case ID. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **fItemSchema** | Boolean | Select True to return the case item metadata schema that has been configured, or False to return the case schema. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **schemaName** | String | The name of the file schema. |
| **caseMetaDataField Entries:** Includes an entry for each field that belongs to the specified file schema. Each entry includes the following information: | | |
| **FieldName** | String | The name of the schema field. |
| **FieldType** | String | The type of the schema field. |
| **Description** | String | The description of the schema field. |
| **InputType** | String | The field's input type (Text, Password, Radiobox, Checkbox, Textarea, etc). |
| **Mandatory** | Boolean | Indicates whether the field is mandatory (True) or not (False). |

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## GET: Get Case Schema Metadata (GetCaseSchemaMetaData)

Retrieve schema information that has been added to a case. Specify the schema by its case ID value.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Enter the case ID. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **CaseSchemaMetaData Entries:** Includes an entry for each field that belongs to the specified file schema. Each entry includes the following information: | | |
| **additionalProp1** | String | Each of these fields contains key-value pairs. In this case, the key will be the schema field of the metadata schema for the particular case, and the value will represent the value assigned to that field inside the case. |
| **additionalProp2** | String | |
| **additionalProp3** | String | |

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## PUT: Update Case Item Schema (updatecaseitemschema)

Update the case item-level schema that has been applied to a case. Once a document has been saved to a case, permitted case users can add custom metadata to the document using the case's applied item-level schema fields.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Enter the case ID. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **schemaName** | String | Enter the name of the schema. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | The ID of the case the schema belongs to. |
| **schemaName** | String | The name of the schema. |

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## PUT: Update Case Schema (updatecaseschema)

Update the case schema that has been applied to a case. Custom metadata schemas help organizations add and track important information about the cases created and the items saved to cases in ZL Discovery Manager. By defining company-specific metadata fields within configured schemas, administrative users can allow privileged users to specify additional information for cases and for individual case items. These fields may be constructed for text inputs, dates, select boxes, combo boxes, check boxes, radio buttons, and multi-select boxes.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Enter the case ID. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **schemaName** | String | Enter the name of the schema. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | The ID of the case the schema belongs to. |
| **schemaName** | String | The name of the schema. |

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## PUT: Update Case Schema Metadata (updateCaseSchemaMetaData)

Update metadata schema that has been applied to a case. Custom metadata schemas help organizations add and track important information about the cases created and the items saved to cases in ZL Discovery Manager. By defining company-specific metadata fields within configured schemas, administrative users can allow privileged users to specify additional information for cases and for individual case items. These fields may be constructed for text inputs, dates, select boxes, combo boxes, check boxes, radio buttons, and multiselect boxes.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **idCase** | **Integer** | Enter the case ID. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **FieldData Entries:** Each entry includes the following information: | | |
| **additionalProp1** | String | Use these fields to specify key-value pairs identifying the metadata fields and values. In this case, the key will be the schema field of the metadata schema for the particular case, and the value will represent the value assigned to that field inside the case. For example:<br>`{`<br>`"idCase": 20,`<br>`"FieldData": {`<br>`"name1": "test",`<br>`"name2": "123"`<br>`}` |
| **additionalProp2** | String | |
| **additionalProp3** | String | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **CaseSchemaMetaData Entries:** Includes an entry for each field that belongs to the specified file schema. Each entry includes the following information: | | |
| **additionalProp1** | String | Each of these fields contains key-value pairs. In this case, the key will be the schema field of the metadata schema for the particular case, and the value will represent the value assigned to that field inside the case. |
| **additionalProp2** | String | |
| **additionalProp3** | String | |

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## PUT: Update Tag (updatetag)

Update a tag's display name and description.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **tagDisplayName** | String | Specify the tag's display name. |
| **tagDescription** | String | Specify a description of the tag. |
| **caseId** | Integer | The ID of the case the tag to be updated belongs to. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **tagId** | Integer | The ID of the tag to be updated. For information on obtaining tag IDs, refer to *GET: Get All Case Tags (getallcasetags)* on page 43. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **parent** | String | The name of the tag's parent tag. |
| **id** | Integer | The tag ID. |
| **caseId** | Integer | The ID of the case the tag belongs to. |
| **parentId** | Integer | The ID of the tag's parent tag. |
| **name** | String | The internal name of the tag. |
| **displayName** | String | The display name of the tag. |
| **tagFlags** | Array | An array of Boolean values indicating the status of various tag attributes. |
| **root_node** | Boolean | Indicates the tag is the root tag. |
| **read_only** | Boolean | Indicates the tag is read-only. |

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| Schema Field | Type | Description |
|---|---|---|
| **enduser_tag** | Boolean | Indicates that the tag can be applied manually. |
| **auto_tag** | Boolean | Indicates that the tag can be applied automatically, i.e., via a tag specification file. |
| **max_tag** | Boolean | Indicates the tag is a mutually exclusive tag. |
| **tag_32** | Boolean | Indicates the tag is a PII tag. |
| **tag_64** | Boolean | Indicates the tag is a content tag. |
| **description** | String | A description of the tag. |
| **createDate** | String | The date and time that the tag was created. |

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# Discovery/Privileges

In the ZL Discovery Manager, privileges can also be assigned within each eDiscovery case to grant users access to operations within the case. A user's role may provide access to operations not allowed by his or her privileges - and vice versa - so it is important to remember that each user will have access to all operations allowed by his assigned role(s) and privilege(s).

There are four possible privileges:

- Case Manager: Permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes. Permission to browse, search, and take action - e.g. tag or export- on documents collected or preserved in the case.
- Case Administrator: Permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes.
- Reviewer: Permission to browse, search, and take action - e.g. tag, or export - on documents collected or preserved in the case.
- Searches: Permission to search.

The following sections describe the Discovery/Privileges endpoints available in the REST API. Use these endpoints to grant and manage privileges within a case:

- *DELTE: Delete All Privileges Within a Case (deleteallprivileges)*
- *DELTE: Delete a User's Privileges Within a Case (deleteprivilege)*
- *GET: Get User Privileges (getuserprivileges)*
- *PUT: Update User Privileges (updateuserprivileges)*

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## DELTE: Delete All Privileges Within a Case (deleteallprivileges)

Delete all user privileges that have been assigned within a case.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case you want to update. All user privileges that have been assigned within this case will be revoked. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the user privileges were deleted successfully.

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## DELTE: Delete a User's Privileges Within a Case (deleteprivilege)

Delete the privileges that have been assigned to a specific user within a case.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **idZlpUser** | Integer | Specify the ID of the user whose privileges are to be revoked. |
| **caseId** | Integer | Specify the ID of the case you want to update. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the user's privileges were deleted successfully.

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## GET: Get User Privileges (getuserprivileges)

Retrieve information regarding the privileges that have been assigned to a user within a particular case. Specify the case by its ID and the user by their ZLP user ID.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **idZlpUser** | Integer | Specify the ZLP user ID of the user you want to view. |
| **caseId** | Integer | Specify the ID of the case you want to view. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserID** | Integer | The ZLP ID of the user. |
| **fullName** | String | The name of the user. |
| **emailAddress** | String | The user's primary email address. |
| **privileges** | Array | An array of Boolean values indicating which privileges the user has been assigned. |
| **reviewPrivileges** | Boolean | If True, the user has permission to browse, search, and take action - e.g., tag, export, remove legal hold - on documents collected or preserved in the case. |
| **searchesPrivileges** | Boolean | If True, the user has permission to search the contents of the case. |
| **caseManagerPrivileges** | Boolean | If True, the user has permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes. This also includes permission to browse, search, and take action - e.g., tag, export, remove legal hold- on documents collected or preserved in the case. |

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| Schema Field | Type | Description |
|---|---|---|
| **administratorPrivileges** | Boolean | If True, the user has permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes. |

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## PUT: Update User Privileges (updateuserprivileges)

Update the user privileges that have been assigned to a user within a particular case. Specify the case by its ID and the user by their ZLP user ID.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **reviewPrivileges** | Boolean | Set to True to grant the user permission to browse, search, and take action - e.g., tag, export, remove legal hold - on documents collected or preserved in the case. |
| **searchesPrivileges** | Boolean | Set to True to grant the user permission to search the contents of the case. |
| **caseManagerPrivileges** | Boolean | Set to True to grant the user permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes. This also includes permission to browse, search, and take action - e.g., tag, export, remove legal hold- on documents collected or preserved in the case. |
| **administratorPrivileges** | Boolean | Set to True to grant the user permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes. |
| **idZlpUser** | Integer | Specify the ZLP user ID of the user you want to view. |
| **caseId** | Integer | Specify the ID of the case you want to view. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserID** | Integer | The ZLP ID of the user. |
| **fullName** | String | The name of the user. |
| **emailAddress** | String | The user's primary email address. |

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| Schema Field | Type | Description |
|---|---|---|
| **privileges** | Array | An array of Boolean values indicating which privileges the user has been assigned. |
| **reviewPrivileges** | Boolean | If True, the user has permission to browse, search, and take action - e.g., tag, export, remove legal hold - on documents collected or preserved in the case. |
| **searchesPrivileges** | Boolean | If True, the user has permission to search the contents of the case. |
| **caseManagerPrivileges** | Boolean | If True, the user has permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes. This also includes Permission to browse, search, and take action - e.g., tag, export, remove legal hold- on documents collected or preserved in the case. |
| **administratorPrivileges** | Boolean | If True, the user has Permission to administer cases including managing case information, custom metadata, tags, privileges, custodians, and case indexes. |

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# Discovery/Tasks

The Discovery Manager includes several background tasks you must execute at different times. For example, after running a search to add data to a case, you must the Run Case Importer background task. This imports the data from any new collections and preservations into the case, updates the case content index (if content indexing is enabled), and builds the parallel index.

The following sections describe the endpoints available within Discovery/Tasks. Use these endpoints to execute the different background tasks, export analysis data, or view the status of the background tasks:

- *POST: Run Background Task*
- *POST: Export Analysis DataGET*: Get Task Status (gettaskstatus)

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## POST: Run Background Task

This section describes the request and response data for the POST endpoints available under Discovery/Tasks. Although there is a separate endpoint provided for each background task, the request and response data is the same for each one. The following table lists the available POST endpoints and describes the background tasks they can be used to execute. Descriptions of the request and response data follow.

| Endpoint Name | Description |
|---|---|
| **leagalholdimport** | Use these background tasks to import items into a case and build the case parallel index. Generally, it is not necessary to run these background tasks separately, as the Run Case Importer background tasks added in ZL UA 9.2 accomplishes all these objectives. For more information, refer to the *Background Tasks and Indexing* chapter of the *ZL Discovery Manager Guide*. |
| **buildcaseitemparallel** | |
| **buildlegalholdparallel** | |
| **caseitemimporter** | |
| **runcaseimporter** | Execute the Run Case Importer background task. Execute this background task after creating a collection or a preservation via ECA search (or re-running a previously saved ECA search), you must execute the Run Case Importer background task. This imports the data from any new collections or preservations into the case, updates the case content index (if content indexing is enabled), and builds the parallel index. |
| **runinplacetransport** | **This option is no longer supported as of the release of ZL UA 11.0.**<br>Execute the Run In-Place Transport background task. This moves any in-place data returned by a search into the ZL Vault. Because these files have not been physically added to the ZL Vault, they cannot be tagged or placed on legal hold. You must first transport the files into the ZL Vault with the Run In-Place Transport task (in addition to running the other background tasks required when adding data to a case). |
| **runsavedsearches** | Execute the Run Saved Searches background task. Use this background task to re-run all searches that have been saved to the case. |
| **runtagger** | Execute the Run Tagger background task. This should be executed after a tag specification rule is uploaded to a case. The Run Tagger task will automatically apply the tag to documents that contain the keyword or phrase within the specified scope of the message. |
| **updateContentIndex** | Execute the Update Content Index background task. This updates the content index within the task. This updates the case's content index, which is used to enable content-based searching of the items added to the case. |

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### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case you want to run the background task on. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **stBuildMode** | String | **Only applicable to the buildcaseitemparallel and buildlegalholdparallel endpoints.**<br>Specify the parallel index task mode. Generally, you should choose **Incremental** as the parallel index task mode. Running the task in **Full_Build** mode will re-build the index entirely, which is comparatively time-consuming and only required in very specific scenarios. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the background task was initiated successfully.

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## POST: Export Analysis Data (analysisExportData)

Export documents that were saved to a case as an analysis search. The export will be generated in the **C:\caseMgmtExport** directory of the machine running the application..

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify ID of the case containing the analysis search to be exported. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **searchId** | Integer | Specify the search (data source) ID of the analysis search. For information on retrieving data source IDs, refer to *GET: Get Case Data Source Using Name (getcasedatasourceusingname) on page 21*. |
| **exportType** | String | Specify the export type:<br>• **PST:** Personal Storage Table<br>• **MIME:** Multipurpose Internet Mail Extensions<br>• **NSF:** Notes Storage Facility<br>• **Metadata:** Metadata CSV file.<br>• **EDRM:** EDRM XML load file format<br>• **FOP:** Formatted file type. Use the **outputType** field to specifiy either **TIFF** or **PDF** files**.** |
| **fileName** | String | Specify the export file name. |
| **sendNotification** | Boolean | Set to True to send email notifications when the export is generated. |
| **password** | String | Specified the password required to open the export file. |
| **outputType** | String | This field is only applicable when **exportType** is set to **FOP**. Specify either **PDF** or **TIFF.** |

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| Parameter | Type | Description |
|---|---|---|
| **isBodyOnly** | Boolean | This setting is only applicable when **exportType** is set to **FOP** for PDF and TIFF file exports.<br><br>When True, the body of any attachments in each formatted PDF/TIFF file will not be included. A formatted file will list the names of any attachments but will not present the body content of these attachments. The attachments will be exported as individual files in their native formats to a separate folder in the same export directory as the PDF/TIFF file.<br><br>When False, the body of any attachments will be included in each formatted PDF/TIFF file, presented inline after the message body. Because the attachment content is integrated into the PDF/TIFF file, the attachments are not exported individually in their native formats. |
| **tiffCompression** | String | This setting is only applicable when **exportType** is set to **FOP** and **outputType** is set to **TIFF.** Use it to specify the TIFF compression type: **LOW** or **HIGH**. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **message** | String | A message indicating whether the export was generated successfully. |
| **caseId** | Integer | The ID of the case containing the analysis search to be exported. |
| **searchId** | Integer | The search (data source) ID of the analysis search being exported. |
| **exportType** | String | The export file type. |
| **fileName** | String | The export file name. |
| **sendNotification** | Boolean | Indicates whether e-mail notifications were sent (True) for the export or not (False). |
| **password** | String | The password specified for opening the export file. |
| **outputType** | String | This field is only applicable when **exportType** is set to **FOP**. Indicates whether the export is **PDF** or **TIFF.** |

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| Parameter | Type | Description |
|---|---|---|
| **isBodyOnly** | Boolean | This setting is only applicable when **exportType** is set to **FOP** for PDF and TIFF file exports. When True, the body of any attachments in each formatted PDF/TIFF file was not included in the export. When False, the body of any attachments was included in each formatted PDF/TIFF file, presented inline after the message body. |
| **tiffCompression** | String | This setting is only applicable when **exportType** is set to **FOP** and **outputType** is set to **TIFF.** It specifies the TIFF compression type: **LOW** or **HIGH**. |

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## GET: Get Task Status (gettaskstatus)

Obtain the status of a background task that is being run on a case.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case the task was executed upon. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **stTask** | String | Select the task whose status you want to obtain. |

### Request Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **message** | String | Information regarding the background task status. |
| **startTime** | String | The date and time the background task began. |
| **taskName** | String | The name of the background task. |
| **pid** | String | The server host name. |
| **currentPhases** | Integer | The phase number the task is currently on. |
| **totalPhases** | Integer | The total number of phases in the task. |
| **doneDate** | String | The date and time the task completed. |
| **status** | String | Each status entry includes additional information about the status of the background task. |

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# Discovery/Custodians

Custodians are targets of an eDiscovery investigation who are likely to possess or have knowledge about the location of documents that are pertinent to a case. In ZL Discovery Manager, custodians function as a way in which aliases and email addresses can be associated with an individual to facilitate searches.

Once an individual has been added as a case custodian, case users can use the custodian as a filter when searching for documents to save to the case, and when searching across documents that have already been saved to the case.

It is also possible to create a custodian preservation: an automatic preservation placed on all mail documents related to a custodian (i.e., messages sent to the custodian or received by the custodian) over a specified time frame. Custodian preservations can be enacted within a case during case creation and/or after the case has been created.

The following sections describe the Discovery/Custodians endpoints available in the REST API. Use these endpoints to manage custodians within a case:

- *POST: Add Custodian (addcustodian)*
- *PUT: Add Custodian Alias (addalias)*
- *GET: Get All Aliases (getallaliases)*
- *GET: Get All Custodians (getallcustodians)*
- *GET: Get Custodian Preservation Using Custodian ID (getcustodianpreservationusingid)*
- *GET: Get All Custodians Using ZLP User ID (getallcutodiansusingzlpuserid)*
- *GET: Get All Custodian Preservations*
- *GET: Get Custodian Using Address (getusingaddress)*
- *GET: Get Custodian Using ID (getusingid)*
- *DELETE: Delete Custodian (delete)*
- *DELETE: Delete Custodian Alias (deletealias)*
- *PUT: Update Custodian (updatecustodian)*

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## POST: Add Custodian (addcustodian)

Add a custodian to a case. You can add a user that has already been added to ZL UA, or you can add a new user.

### Request Parameters

None.

### Request Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case the custodian should be added to. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **Type** | Integer | Specify any integer value. |
| **zlpUserId** | Integer | If the custodian already exists in ZL UA, specify their ZLP user ID. |
| Configure the remaining fields if the custodian has not been added to ZL UA. If the user has already been added to ZL UA, you can omit these fields. | | |
| **fTerminated** | Boolean | Set to True if the custodian should be set to terminated status. |
| **fullName** | String | Specify the full name of the custodian. |
| **Address** | String | Specify the primary email address of the custodian. |
| **externalReference** | String | Use this optional field to store any unique IDs used outside of ZL UA. |
| **miscellaneous** | String | Enter any miscellaneous information about the custodian. |
| **fAddAlias** | Boolean | Set to True to create a new alias for the custodian. |

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **Id** | Integer | The custodian ID assigned to the user. |
| **caseId** | Integer | Specify the ID of the case the custodian should be added to. |
| **zlpUserId** | Integer | The ZLP user ID of the new custodian. |

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| Parameter | Type | Description |
|---|---|---|
| **isTerminated** | Boolean | If True, the user has been terminated. |
| **Address** | String | Specify the primary email address of the custodian. |
| **externalReference** | String | Use this optional field to store any unique IDs used outside of ZL UA. |
| **fullName** | String | Specify the full name of the custodian. |
| **createDate** | String | The date the custodian was created. |
| **misc1** | String | Miscellaneous information about the custodian. |
| **custodianType** | Integer | The custodian type. |

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## PUT: Add Custodian Alias (addalias)

Add an alias to a custodian.

### Request Parameters

None.

### Request Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case containing the custodian to be updated. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **custodianId** | Integer | Specify the ID of the custodian to be updated. For information on obtaining custodian IDs, refer to *GET: Get All Custodians (getallcustodians)* on page 83. |
| **aliasType** | Integer | Specify the alias type:<br>• 0: Default (Email)<br>• 1: X500 DN<br>• 2: Address<br>• 3: Manual<br>• 4: Exchange Legacy DN<br>• 5: Transformed Lotus DN<br>• 6: NetBios User Name<br>• 100: IM<br>• 200: Bloomberg<br>• 300: Parlano |
| **alias** | String | Specify the new alias. |
| **createDate** | String | Not required. |

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### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | The ID of the case containing the custodian that has been updated. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **custodianId** | Integer | The ID of the custodian that has been updated. |
| **aliasType** | Integer | The alias type:<br>• 0: Default (Email)<br>• 1: X500 DN<br>• 2: Address<br>• 3: Manual<br>• 4: Exchange Legacy DN<br>• 5: Transformed Lotus DN<br>• 6: NetBios User Name<br>• 100: IM<br>• 200: Bloomberg<br>• 300: Parlano |
| **alias** | String | The new alias. |
| **createDate** | String | The alias creation date. |

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## GET: Get All Aliases (getallaliases)

Retrieve all aliases that have been added to a case for a particular custodian.

### Request Parameters

None.

### Request Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case containing the custodian to be viewed. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **custodianId** | Integer | Specify the ID of the custodian to be viewed. For information on obtaining custodian IDs, refer to *GET: Get All Custodians (getallcustodians)* on page 83. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **Custodian Alias Entries:** The response includes an entry for each alias that has been added to the case for this custodian. Each entry includes the following information: | | |
| **caseId** | Integer | The case ID. |
| **custodianId** | Integer | The custodian ID. |

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| Parameter | Type | Description |
|---|---|---|
| **aliasType** | Integer | The alias type:<br>• 0: Default (Email)<br>• 1: X500 DN<br>• 2: Address<br>• 3: Manual<br>• 4: Exchange Legacy DN<br>• 5: Transformed Lotus DN<br>• 6: NetBios User Name<br>• 100: IM<br>• 200: Bloomberg<br>• 300: Parlano |
| **alias** | String | The new alias. |
| **createDate** | String | The alias creation date. |

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## GET: Get All Custodians (getallcustodians)

Retrieve information for all custodians that have been added to a case.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case containing the custodians to be viewed. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **Custodian Alias Entries**: The response includes an entry for each custodian that has been added to the case. Each entry includes the following fields: | | |
| **id** | Integer | The custodian ID assigned to the user. |
| **caseId** | Integer | Specify the ID of the case the custodian should be added to. |
| **zlpUserId** | Integer | The ZLP user ID of the custodian. |
| **isTerminated** | Boolean | If True, the user has been terminated. |
| **address** | String | Specify the primary email address of the custodian. |
| **externalReference** | String | Use this optional field to store any unique IDs used outside of ZL UA. |
| **fullName** | String | Specify the full name of the custodian. |

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| Parameter | Type | Description |
|---|---|---|
| **createDate** | String | The date the custodian was created. |
| **misc1** | String | Miscellaneous information about the custodian. |
| **custodianType** | Integer | The custodian type. |

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## GET: Get Custodian Preservation Using Custodian ID (getcustodianpreservationusingid)

A custodian preservation in ZL UA is an automatic preservation placed on all mail documents related to a custodian (i.e., messages sent to the custodian or received by the custodian) over a specified time frame. Custodian preservations can be enacted within a case during case creation and/or after the case has been created. Use this endpoint to view a custodian preservation.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **idCustodianPreservation** | Integer | Specify the preservation ID. For information on obtaining preservation IDs, refer to *GET: Get All Custodian Preservations (getallcustodianpreservation)* on page 89. |

### Request Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **id** | Integer | The preservation ID. |
| **caseId** | Integer | The ID of the case the preservation has been added to. |
| **custodianId** | Integer | The ID of the custodian the preservation belongs to. |
| **zlpUserId** | Integer | The ZLP user ID of the custodian. |
| **dataSourceId** | Integer | The data source ID of the preservation. |
| **searchStoreId** | Integer | The ID of the search store that was used for the preservation (i.e., the store that was searched). |
| **createDate** | String | The date and time that the preservation was created. |
| **searchQueryBeginDate**<br>**searchQueryEndDate** | String | These fields specify the date range for the preservation. Messages sent to - or received by - the custodian during this date range are added to the preservation. |

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| Parameter | Type | Description |
|---|---|---|
| **isFutureEnabled** | Boolean | If set to True, any messages ingested into ZL UA going forward that were sent to – or received by – this custodian will be put on legal hold and saved to the case during processing. |
| **endDate** | String | If **isFutureEnabled** is set to True, this indicates the date and time that custodian-related messages for this custodian will no longer be saved to the case. |
| **isMarkedForDeletion** | Boolean | If True, it indicates that the preservation is marked for deletion. |
| **notes** | String | Additional information about the preservation. |

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## GET: Get All Custodians Using ZLP User ID (getallcutodiansusingzlpuserid)

Retrieve information for a custodian. Specify the custodian by his or her user ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to grant roles to. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **id** | Integer | The custodian ID assigned to the user. |
| **caseId** | Integer | Specify the ID of the case the custodian should be added to. |
| **zlpUserId** | Integer | The ZLP user ID of the custodian. |
| **isTerminated** | Boolean | If True, the user has been terminated. |
| **address** | String | Specify the primary email address of the custodian. |
| **externalReference** | String | Use this optional field to store any unique IDs used outside of ZL UA. |
| **fullName** | String | Specify the full name of the custodian. |
| **createDate** | String | The date the custodian was created. |

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| Parameter | Type | Description |
|---|---|---|
| **misc1** | String | Miscellaneous information about the custodian. |
| **custodianType** | Integer | The custodian type. |

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## GET: Get All Custodian Preservations (getallcustodianpreservation)

A custodian preservation in ZL UA is an automatic preservation placed on all mail documents related to a custodian (i.e., messages sent to the custodian or received by the custodian) over a specified time frame. Custodian preservations can be enacted within a case during case creation and/or after the case has been created. Use this endpoint to view all custodian preservations that have been added to a case.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **idCase** | Integer | Specify the ID of the case whose custodian preservations you want to view. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **Custodian Preservation Entries**: The response includes an entry for each custodian preservation that has been added to the case. Each entry includes the following fields: | | |
| **id** | Integer | The preservation ID. |
| **caseId** | Integer | The ID of the case the preservation has been added to. |
| **custodianId** | Integer | The ID of the custodian the preservation belongs to. |
| **zlpUserId** | Integer | The ZLP user ID of the custodian. |
| **dataSourceId** | Integer | The data source ID of the preservation. |

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| Parameter | Type | Description |
|---|---|---|
| **searchStoreId** | Integer | The ID of the search store that was used for the preservation (i.e., the store that was searched). |
| **createDate** | String | The date and time that the preservation was created. |
| **searchQueryBeginDate**<br>**searchQueryEndDate** | String | These fields specify the date range for the preservation. Messages sent to - or received by - the custodian during this date range are added to the preservation. |
| **isFutureEnabled** | Boolean | If set to True, any messages ingested into ZL UA going forward that were sent to – or received by – this custodian will be put on legal hold and saved to the case during processing. |
| **endDate** | String | If **isFutureEnabled** is set to True, this indicates the date and time that custodian-related messages for this custodian will no longer be saved to the case. |
| **isMarkedForDeletion** | Boolean | If True, it indicates that the preservation is marked for deletion. |
| **notes** | String | Additional information about the preservation. |

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## GET: Get Custodian Using Address (getusingaddress)

Retrieve information for a custodian that has been added to a case. Specify the custodian to be viewed by their email address.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case containing the custodian to be viewed. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **address** | String | Specify the custodian's primary email address. |

### Request Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **id** | Integer | The custodian ID assigned to the user. |
| **caseId** | Integer | The ID of the case the custodian should be added to. |
| **zlpUserId** | Integer | The ZLP user ID of the custodian. |
| **isTerminated** | Boolean | If True, the user has been terminated. |
| **address** | String | Specify the primary email address of the custodian. |
| **externalReference** | String | An optional field to store any unique IDs used outside of ZL UA. |
| **fullName** | String | The full name of the custodian. |
| **createDate** | String | The date the custodian was created. |
| **misc1** | String | Miscellaneous information about the custodian. |
| **custodianType** | Integer | The custodian type. |

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## GET: Get Custodian Using ID (getusingid)

Retrieve information for a custodian that has been added to a case. Specify the custodian to be viewed by their custodian ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case containing the custodian to be viewed. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **custodianId** | Integer | Specify the custodian ID. For information on obtaining custodian IDs, refer to *GET: Get All Custodians (getallcustodians)* on page 83. |

### Request Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **id** | Integer | The custodian ID assigned to the user. |
| **caseId** | Integer | The ID of the case the custodian was added to. |
| **zlpUserId** | Integer | The ZLP user ID of the custodian. |
| **isTerminated** | Boolean | If True, the user has been terminated. |
| **address** | String | The primary email address of the custodian. |
| **externalReference** | String | An optional field to store any unique IDs used outside of ZL UA. |
| **fullName** | String | The full name of the custodian. |
| **createDate** | String | The date the custodian was created. |
| **misc1** | String | Miscellaneous information about the custodian. |
| **custodianType** | Integer | The custodian type. |

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## DELETE: Delete Custodian (delete)

Remove a custodian from a case.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case containing the custodian to be removed. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **custodianId** | Integer | Specify the ID of the custodian to be removed. For information on obtaining custodian IDs, refer to *GET: Get All Custodians (getallcustodians)* on page 83. |

### Request Schema Fields

None.

### Response Schema Fields

A string indicating whether the custodian was removed successfully.

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## DELETE: Delete Custodian Alias (deletealias)

Remove a custodian alias.

### Request Parameters

None.

### Request Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case containing the custodian to be updated. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **custodianId** | Integer | Specify the ID of the custodian to be updated. For information on obtaining custodian IDs, refer to *GET: Get All Custodians (getallcustodians)* on page 83. |
| **aliasType** | Integer | Specify the alias type:<br>• 0: Default (Email)<br>• 1: X500 DN<br>• 2: Address<br>• 3: Manual<br>• 4: Exchange Legacy DN<br>• 5: Transformed Lotus DN<br>• 6: NetBios User Name<br>• 100: IM<br>• 200: Bloomberg<br>• 300: Parlano |
| **alias** | String | Specify the alias. |
| **createDate** | String | Not required. |

### Response Schema Fields

A string indicating whether the custodian alias was removed successfully.

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## PUT: Update Custodian (updatecustodian)

Update a custodian's basic configuration, such as their full name.

### Request Parameters

None.

### Request Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the ID of the case the custodian to be updated belongs to. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **custodianId** | Integer | Specify the custodian ID of the custodian to be updated. For information on obtaining custodian IDs, refer to *GET: Get All Custodians (getallcustodians)* on page 83. |
| **fullName** | String | Specify the full name of the custodian. |
| **externalReference** | String | Use this optional field to store any unique IDs used outside of ZL UA. |
| **miscellaneous** | String | Enter any miscellaneous information about the custodian. |

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **id** | Integer | The custodian ID assigned to the user. |
| **caseId** | Integer | The ID of the case the custodian has been added to. |
| **zlpUserId** | Integer | The ZLP user ID of the new custodian. |
| **isTerminated** | Boolean | If True, the user has been terminated. |
| **address** | String | The primary email address of the custodian. |
| **externalReference** | String | An optional field to store any unique IDs used outside of ZL UA. |
| **fullName** | String | The full name of the custodian. |
| **createDate** | String | The date the custodian was created. |

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| Parameter | Type | Description |
|---|---|---|
| **misc1** | String | Miscellaneous information about the custodian. |
| **custodianType** | Integer | The custodian type. |

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# UAA/Departments

A department is defined by ZL UA as a hierarchical grouping of users. Each user created in ZL UA is grouped into a department that has been added to the system. The structure of the departmental hierarchy configured in ZL UA often resembles the organization's actual departmental structure, but this configuration model is not required.

The highest level of this department hierarchy is the ROOT department, beneath which all other departments are created. Every department created beneath the ROOT department will inherit the compliance settings of the ROOT department by default.

A department can have one or more sub-departments beneath it in the department hierarchy. These are referred to as the department's *child departments.* Each child department inherits the compliance settings of its parent department by default. However, an administrative user with the proper permissions can configure a department's compliance settings to diverge from those of its parent department. Each user recognized in the system must be associated with one (and only one) department.

The following sections describe the UAA/Mail Servers endpoints available in the REST API. Use these endpoints to create and update servers:

- *POST: Create Child Department (createchilddepartment):* Create a department.
- *DELETE: Delete Department (deleteDepartment)*: Remove a department.
- *GET: Get Child Departments (getallchilddepartment):* Retrieve the configuration of a child department.
- *GET: Get All Departments Using Name (getalldeptsusingnamepattern):* Retrieve the configuration of a department(s) whose name matches a search pattern.
- *GET: Get Users of a Department (getallusers):* Retrieve a list of the users that have been added to a department.
- *GET: Get Department Using ID (getdepartmentusingid):* Retrieve the configuration of a department specified by its ID.
- *GET: Get Department By Name (getdepartmentusingname):* Retrieve the configuration of a department specified by its name.
- *GET: Get Department Parent Information By ID (getparentdepartment):* Retrieve the configuration of department's parent department.
- *GET: Get Department Policy Information Using ID (getpolicy):* Retrieve information regarding the default compliance policies that have been assigned to a department.
- *PUT: Update Department (updatedepartment):* Update the configuration of a department.
- *PUT: Update Parent Department (updateparentdepartment):* Update the parent department assigned to a department.

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## POST: Create Child Department (createchilddepartment)

Create a child department.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **name** | String | **MANDATORY**. Type the internal name of the new department. Internal department names cannot be re-used, even after a department has been deleted.<br><br>If you delete a department and need to re-create it later, you could set the new department's display name to match the deleted department's display name. This should make the new department's purpose clear to users who are browsing the departmental hierarchy in the UAA module. |
| **displayName** | String | **MANDATORY**. Type an identifying name for the new department. This name will be displayed whenever the departmental hierarchy is displayed in the UAA module. |
| **domainName** | String | Enter a domain name here to create a new domain. Leave this field blank if the domain name is the same as the department name. |
| **parentServerName** | String | Enter the name of the department's parent department. A child department inherits the compliance settings of its parent department, unless those settings are overwritten manually. |
| **classifierName** | String | **MANDATORY**. Enter the name of the lexicon to be assigned to the new department. Each department can have only one lexicon assigned to it. Lexicons must be created with the Compliance Manager module. |
| **externalReference** | String | Use this optional field to store any unique IDs used outside of ZL UA. |
| **deptTags** | String | Input to this field is not required. |

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| Schema Field | Type | Description |
|---|---|---|
| **reviewEscalationDepts** | String | Specify the name(s) of the Review Escalation Department that should be used when reviewers assigned to this department are unable to make a review decision on a particular message. These reviewers will have the option to escalate the message, effectively passing it on to the Review Escalation Department for a review decision.<br>If there is more than one Review Escalation Department, enter the names as a comma-separated list. |
| **miscField1**<br>**miscField2** | String | Use these optional fields to type any additional notes for the department being created. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The department ID. |
| **name** | String | The department internal name. |
| **displayName** | String | The department display name. |
| **parentDepartmentId** | String | The ID of the parent department. |
| **domain** | String | The department domain name. |
| **parentServerName** | String | The department's parent department. |
| **domainId** | String | The ID of the department's domain. |
| **journalDomain** | String | The journal domain assigned to the department. |
| **journalDomainId** | String | The ID of the journal domain assigned to the department. |
| **createDate** | String | The date and time the department was created. |
| **lastUpdate** | String | The date and time the department's configuration was last updated. |
| **externalReference** | String | An optional field used to store any unique IDs used outside of ZL UA. |
| **departmentTags** | String | List any department tags that have been applied to the department. |
| **miscField1**<br>**miscField2** | String | Any miscellaneous information entered when the department was created. |

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| Schema Field | Type | Description |
|---|---|---|
| **classifierName** | String | The name of the lexicon assigned to the department. |
| **reviewEscalationDepts** | String | The name of the Review Escalation Departments assigned to the department. |
| **isProcessingCenter** | Boolean | Indicates whether the department is configured as a processing center. |

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## DELETE: Delete Department (deleteDepartment)

Delete a department.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **deptId** | Integer | Specify the ID of the department to be deleted. UAA/Departments includes several GET endpoints you can use to retrieve department IDs, as described in the following sections. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the department was deleted successfully.

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## GET: Get Child Departments (getallchilddepartment)

Retrieve the configurations of a department's child departments. Identify the department by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **deptId** | Integer | Specify the ID of the department whose child department configurations you want to view. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema includes an entry for each child department that is found. The fields included in each child department entry are the same as those included in the response returned after creating a department. They represent the configuration of the child department. For descriptions of these fields, refer to *POST: Create Child Department* on page 98.

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## GET: Get All Departments Using Name (getalldeptsusingnamepattern)

Retrieve the configuration of a department. Identify the department by its name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **deptNamePattern** | Integer | Enter the search pattern. The search will return information for departments whose name includes or is similar to the search pattern. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema includes an entry for each department that is found. The fields included in each department entry are the same as those included in the response returned after creating a department. They represent the configuration of the child department. For descriptions of these fields, refer to *POST: Create Child Department* on page 98.

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## GET: Get Users of a Department (getallusers)

Retrieve a list of the users that have been added to a department.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **departmentName** | Integer | Specify the name of the department whose users you want to view. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Department Users:** Includes an entry for each user included in the specified department. The schema fields included in each entry are described below. | | |
| **idZlpUser** | Integer | The ZL user ID assigned to the user. |
| **type** | Integer | The user type: 0 for a user, or 100 for a user group. |
| **address** | String | The user's primary email address. |
| **owner** | String | The user's owner. This is meant to identify the user's manager or the user's creator. |
| **extReference** | String | Unique ID or information used outside of ZL UA that is relevant to the user. |
| **userTags** | String | User tags applied to the user. |
| **retTags** | String | Retention tags applied to the user. |
| **altReviewDepts** | String | The Alternate Review Department(s) the user is assigned to. |
| **deptName** | String | The department the user is assigned to. |
| **reviewDeptName** | String | The Review Department the user is assigned to. |

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| Schema Field | Type | Description |
|---|---|---|
| **mailServerName** | String | The mail server for this user. |
| **mailStoreInfo** | String | Mail store information for this user. |
| **syncExclude** | Boolean | Indicates whether the user should be excluded (True) from User Synchronizations or not (False). |
| **archive** | Boolean | Set to True if the user is available for archiving and journaling, respectively. |
| **journal** | Boolean | |
| **fullName** | String | The first and last name of the user. |
| **dateCreate** | String | The date and time the user was created. |
| **dateLastUpdate** | String | The date and time the user last updated. |
| **connectUserId** | String | The user ID used to connect to the user's mail server. |
| **dateHire** | String | The date and time the user was hired. |
| **dateTerminated** | String | The date and time the user was terminated, if applicable. |
| **terminated** | Boolean | Indictes whether the user has been Terminated (True) or not. |
| **dateIterStart** | String | These fields indicate that date and time that the last user synchronization process started and ended, and the date and time that the user's information was updated during synchronization. |
| **dateIterEnd** | String | |
| **dateIterUpdate** | String | |
| **dateFullScanStart** | String | The date and time that the last full scan of the user's mailbox began. |
| **dateFullScanEnd** | String | The date that the last full scan of the user's mailbox ended. |
| **dateArchiveBegin** | String | The date and time that archiving of the user's date began. |
| **miscField1**<br>**miscField2** | String | Additional information entered for the user. |

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## GET: Get Department Using ID (getdepartmentusingid)

Retrieve the configuration of a department. Identify the department by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **deptId** | Integer | Enter the ID of the department to view. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the specified department are the same as those included in the response returned after creating a department. They represent the configuration of the department. For descriptions of these fields, refer to *POST: Create Child Department* on page 98.

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## GET: Get Department By Name (getdepartmentusingname)

Retrieve the configuration of a department. Identify the department by its name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **deptName** | String | Enter the name of the department whose configuration is to be retrieved. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the specified department are the same as those included in the response returned after creating a department. They represent the configuration of the department. For descriptions of these fields, refer to *POST: Create Child Department* on page 98.

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## GET: Get Department Parent Information By ID (getparentdepartment)

Retrieve the configuration of a parent department. Identify the department whose parent is to be retrieved by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **deptId** | Integer | Enter the ID of the department whose parent is to be retrieved. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the parent department are the same as those included in the response returned after creating a department. They represent the configuration of the parent department. For descriptions of these fields, refer to *POST: Create Child Department* on page 98.

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## GET: Get Department Policy Information Using ID (getpolicy)

View the policies that have been assigned to a department. Identify the department by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **deptId** | Integer | Enter the ID of the department to view. |
| **stPolicyType** | String | Select the policy you want to view (e.g., Archiving, Stubbing, etc). |

### Request Body Schema Fields

None.

### Response Schema Fields

The following fields are returned for each policy specified in the input.

| Parameter | Type | Description |
|---|---|---|
| **policyName** | String | The policy name. |
| **policyDesc** | String | A description of the policy. |
| **policyType** | String | The policy type. |
| **createDate** | String | The date and time the policy was created. |
| **policiesRules:** Includes an entry for each policy rule that has been added to the policy. Each entry includes the following fields: | | |
| **policyId** | Integer | The ID of the policy to which you want to add the rule to. You can use the ***POST: Get Policy Using Policy*** ID endpoint to retrieve policy ID values. For more information, refer to ***POST: Get Policy Using Policy*** ID on page 323. |
| **policyRuleId** | Integer | Ignore this field when creating a policy rule. Use it to specify the ID of the rule when updating one with the PUT: Update Policy Rule endpoint.<br>You can use the GET: Get Policy Rules Using ID endpoint to retrieve policy rule ID values. For more information, refer to *GET: Get Policy Rules Using ID* on page 325. |
| **policyRuleName** | String | The name of the policy rule (required). |

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| Parameter | Type | Description |
|---|---|---|
| **policyRuleDesc** | String | A description of the policy rule. |
| **policyRuleActionCode** | Integer | The action code for the policy rule. This identifies the action to be taken upon files the policy is applied to. |
| **listPolicyRuleConditions:** Includes an entry for each condition that you plan to add to the policy rule. Each file or message is checked against these conditions to determine if the policy rule and the associated action will be applied. Each entry includes the following fields:<br>• **Field:** The content field to check against the condition.<br>• **Subfield:** The content subfield to check against the condition.<br>• **Operator:** The operator defines how the content field and sub-field will be checked against the condition.<br>• **Pattern:** The pattern to check against the content field and sub-field.<br>For example, if the **Field** is set to **Has Attachment** and the **Operator** to is true, the condition would check for messages or files that have attachments. | | |
| **policyRuleConditionDesc** | String | A concise description of all the conditions of a policy rule. For example, a policy rule written to apply to text files that were last accessed later than October 8, 2024 would appear as follows: `"IF File Last Accessed Date Later Than '2024/10/08 ' AND File Type Equals (Match case) '.txt' "` |
| **policyRulesActionDisplay** | String | A description of the action type assigned to the policy rule. |
| **policyActionParams** | String | This includes the action parameters configured for the policy rule. For example:<br>`"policyActionParams": {`<br>`"Archive Action": "0",`<br>`}` |

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## PUT: Update Department (updatedepartment)

Update a department's configuration.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **deptId** | Integer | Specify the ID of the department to be updated. UAA/Departments includes several GET endpoints you can use to retrieve department IDs, as described in the previous sections. |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **name** | String | Type the internal name of the department. Internal department names cannot be re-used, even after a department has been deleted.<br>If you delete a department and need to re-create it later, you could set the new department's display name to match the deleted department's display name. This should make the new department's purpose clear to users who are browsing the departmental hierarchy in the UAA module. |
| **displayName** | String | **MANDATORY**. Type the identifying name for the department. This name will be displayed whenever the departmental hierarchy is displayed in the UAA module. |
| **domainName** | String | Enter the name in the Domain name text box to create a new domain. Leave the Domain name text box blank if the domain name is the same as the department name. |
| **parentServerName** | String | Enter the name of the department's parent department. A child department inherits the compliance settings of its parent department, unless those settings are overwritten manually. |
| **classifierName** | String | Enter the name of the lexicon to be assigned to the department. Each department can have only one lexicon assigned to it. Lexicons must be created with the Compliance Manager module. |
| **externalReference** | String | Use this optional field to store any unique IDs used outside of ZL UA. |
| **deptTags** | String | Input to this field is not required. |

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| Schema Field | Type | Description |
|---|---|---|
| **reviewEscalationDepts** | String | Specify the name of the Review Escalation Department that should be used when reviewers assigned to this department are unable to make a review decision on a particular message. These reviewers will have the option to escalate the message, effectively passing it on to the Review Escalation Department for a review decision. |
| **miscField1**<br>**miscField2** | String | Use these optional fields to type any additional notes for the department being created. |

### Response Schema Fields

The **Response Schema Fields** returned represent the updated configuration of the department. This is the same set of fields as the **Request Schema Fields** described earlier.

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## PUT: Update Parent Department (updateparentdepartment)

Update the parent department assigned to a department.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **deptId**<br>**parentId** | Integer | Specify the ID of the department to be updated as the **deptId** value, and the ID of the department that should be assigned as its parent ID as the **parentId** value. UAA/Departments includes several GET endpoints you can use to retrieve department IDs, as described in the previous sections. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the department are the same as those included in the response returned after creating a department. They represent the configuration of the department. For descriptions of these fields, refer to *POST: Create Child Department* on page 98.

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# Discovery/Reports

The following sections describe the Discovery/Reports endpoints available in the REST API. Use these endpoints to download any of the following reports:

- **Download Audit Trail Report**: This report lists the actions taken upon a case and indicates which user performed each action.
- **Download Preservation Hits Report:** This report indicates how many messages were returned for each custodian in the preservations included in a particular case and search store.
- **Download Case Custodian Report:** This report presents details of all the custodians added to the case within their assigned departmental scope.
- **Download Export Task Report:** This report presents detailed information on every export action taken within the case.
- **Download Global Case Report:** This report presents details of all the cases within your assigned departmental scope. It includes information such as the case name, case ID, case mode, case filing date, docket number, and more.
- **Download Global Custodian Report:** This report presents details of all the custodians that have been added to cases within your assigned departmental scope. It includes information such as the custodian's name and email address and the names and IDs of the cases the custodian has been added to.
- **Download User Entitlement Report:** This report summarizes the roles and role scopes that have been granted to users in the ZL Discovery Manager application.
- **Download Consolidated Reports of Collection, Preservation and Analysis:** This report summarizes the collections, preservations and analysis searches that have been added to a case.
- **Download Custodian Preservation Report:** This report summarizes the custodian preservations that have been added to cases.
- **Download Global Survey Report:** This report is a consolidated report of all the surveys across all the cases accessible to you in ZL Discovery Manager.
- **Download Keyword Expansion Report:** This report indicates how many messages within the search store contain variations of the keyword(s) that have been entered as search criteria into the ECA search, providing early visibility into search results.
- **Download Preservation Notification Status Report:** This report summarizes the status of each preservation notification. It includes information such as the notification name and ID, the case name, and the creation date for each preservation notification.
- **Download Search Term Report:** This report summarizes the search terms used to conduct a search.
- **Download Workflow Audit Term Report:** This report presents details on either Investigation Request Workflow actions or on Case Survey-related actions taken in the ZL Discovery Manager application.

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## POST: Download Audit Report (downloadAuditReport)

Download an audit report for a case. This lists the actions taken upon the case, and indicates which user performed each action. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the case ID. |
| **action**<br>**subAction** | String | Specify the action type and sub-type you want to view. Each action type has a group of action sub-types you can view in the audit report. You can specify **any** to return audit trail data for all actions and action sub-types.<br>Refer to the following section, *Action Types and Sub-Types,* if you want to retrieve more specific sets of audit trail data. For example, you could set **action** to **tag** and **subAction** to **Tag Created** to view audit trail data for tag creation operations. |
| **dateMode** | String | Set this to any of the following values:<br>• **1day**: Actions performed within the last day.<br>• **1week**: Actions performed within the last week.<br>• **1month**: Actions performed within the last 30 days.<br>• **date range**: Actions performed within a specific date range. |
| **startDate**<br>**endDate** | String | Use these fields to specify the start date and end date for the report (inclusive) when the **dateMode** is set to **date range**. Audit trail data for this date range will be included in the report. |

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### Action Types and Sub-Action Types

| Action Type | Available Sub-Types |
|---|---|
| **case** | Case Created, Case Updated, Case Deleted, Case Subscribed, Case Unsubscribed, Any |
| **tag** | Tag Created, Tag Deleted, Any |
| **item** | Item Exported, Legal Hold Flag Removed, Tag Applied, Item Reviewed, Tag Removed, Item Imported, Item Marked as Not Reviewed, Reviewer Assigned, Reviewer Unassigned, Item Redacted, Item Downloaded, Item Redaction Removed, Item Inline Annotated, Item Redaction Preview, Item PDF Download, Item Flagged, Item Viewed, Item Updated, Item Deleted, Legal Hold Flag Set, Any |
| **custodian** | Custodian Created, Custodian LegalHold Created, Custodian Updated, Custodian LegalHold Deleted, Custodian Deleted, Custodian Legal Hold Updated, Custodian Alias Created, Any |
| **member** | User Deleted, User Added, User Modified, Any |
| **search** | Case Search Updated Manually, Case Level Search Performed, Case Background Task Run, Search Saved, Search Deleted, Update Case DataSource, Search Performed, Any |

### Response Schema Fields

None.

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## POST: Download Custodian Preservation Hit Report (downloadcustodianpreservationhitreport)

Download a Custodian Preservation Hit Report. This report indicates how many messages were returned for each custodian in the preservations included in a particular case and search store. The report will be downloaded to the **Downloads** directory.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | The ID of the case the preservation belongs to. |
| **storeId** | Integer | The ID of the search store that was used to create the preservation (i.e., the store that was searched). You can extract search store IDs from the **SearchStore** database table. |

### Request Body Schema Fields

None.

### Response Schema Fields

None.

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## POST: Download Case Custodian Report (downloadCustodianReport)

Download a case custodian report. The case custodian report is a consolidated report that presents details of all the custodians added to the case within their assigned departmental scope. The report will be downloaded to the **Downloads** directory.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the case ID. |

### Request Body Schema Fields

None.

### Response Schema Fields

None.

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## POST: Download Export Task Report (downloadExportTaskReport)

Download an export task report for a case. This report presents detailed information on the export actions taken within the case. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **idCase** | Integer | Specify the case ID. |
| **dateStart**<br>**dateEnd** | String | The start date and end date for the report (inclusive). Export task data for this date range will be included in the report. |

### Response Schema Fields

None.

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## POST: Download Global Case Report (downloadGlobalCaseReport)

Download the global case report: a consolidated report that presents details of all the cases within your assigned departmental scope. It includes information such as the case name, case ID, case mode, case filing date, docket number, and more. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

None.

### Response Schema Fields

None.

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## POST: Download Global Custodian Report (downloadGlobalCustodianReport)

Download the global custodian report: a consolidated report that presents details of all the custodians that have been added to cases within your assigned departmental scope. It includes information such as the custodian's name and email address and the names and IDs of the cases the custodian has been added to. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

None.

### Response Schema Fields

None.

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## POST: Download User Entitlement Report (downloadUserEntitlementReport)

Download the user entitlement report, which summarizes the roles and role scopes that have been granted to users in the ZL Discovery Manager application. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

None.

### Response Schema Fields

None.

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## POST: Download Consolidated Reports of Collections, Preservations and Analysis (downloadConsolidatedReports)

Download a report summarizing the collections, preservations and/or analysis searches that have been added to a case. The report will be downloaded to the **Downloads** directory.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the case ID. |
| **reportPurpose** | String | Specify the data sources you want to view in the report. Select **Collections**, **Preservations**, **Analysis** or **All.** |

### Request Body Schema Fields

None.

### Response Schema Fields

None.

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## POST: Download Custodian Preservation Report (downloadCustodianPreservationReport)

Download a custodian preservation report, which summarizes the custodian preservations that have been added to cases. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseMode** | Integer | Specify the case mode. |
| **caseIds** | Integer | An array of case IDs to specify the cases for which you want to view custodian preservation data. Specify the case IDs as a comma-separated list. For example:<br>`"caseIds": [ 0,1,2,3 ]` |
| **srchField** | String | Use this field to specify how the search will be performed:<br>• **fullName:** Search by user name.<br>• **alias:** Search by user alias.<br>• **owner:** Search by owner. |
| **srchPattern** | String | Enter a search pattern to locate the custodians of interest. |
| **dateEnd** | String | Specify the end date for the report. |

### Response Schema Fields

None.

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## POST: Download Global Survey Report (downloadGlobalSurveyReport)

Download a global survey report, a consolidated report of all the surveys or preservation notifications across a specific case, or across all accessible cases. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseMode** | Integer | Specify the case mode. Enter **any** to search any case. Enter **only** and specify a case ID with the **caseId** field to search a specific case. |
| **Type** | String | Enter **caseSurveys** to view the details of the case surveys, or **preservation** to view the details of preservation notifications. |
| **caseId** | Integer | Specify the case ID. This is applicable when the **caseMode** is set to **only.** |
| **surveyIds** | Integer | An array of survey IDs you want to view. Specify the case IDs as a comma-separated list. For example:<br>`"surveyIds": [ 0,1,2,3 ]` |

### Response Schema Fields

None.

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## POST: Download Keyword Expansion Report (downloadKeywordExpansionReport)

Download a keyword expansion report. This report indicates how many messages within the search store contain variations of the keyword(s) that have been entered as search criteria into the ECA search, providing early visibility into search results. You can choose which terms should be included in the ECA search from the results. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | The ID of the case that you want to search. |
| **searchStoreId** | Integer | The ID of the search store. You can extract search store IDs from the **SearchStore** database table. |
| **fields** | String | An array specifying the message components to search. You can use the following values: **msgSubject**, **msgBody**, **msgAttachment**, **msgAttachmentNames**, and **msgAttachmentChildPath**.<br>Specify the field names as a comma-separated list. For example, to search the message subject and message body, you would enter:<br>`"fields": [ msgSubject, msgBody ]`<br>Leave this blank to view all survey data for the specified case. |
| **pattern** | String | Enter the pattern to search for. The report will indicate how many items within the specified search store contain this pattern in the specified fields. |

### Response Schema Fields

None.

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## POST: Download Preservation Notification Status Report (downloadPreservationNotificationStatusReport)

Download a preservation notification status report, which summarizes the status of each preservation notification. It includes information such as the notification name and ID, the case name, and the creation date for each preservation notification. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

None.

### Response Schema Fields

None.

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## POST: Download Search Terms Report (downloadSearchTermReport)

Download a search term report, which summarizes the search terms used to conduct a search. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **caseId** | Integer | Specify the case ID. For information on obtaining case IDs, refer to *GET: Get Case Info (getallcaseusingname)* on page 41 or *GET: Get Case Info (getallcaseusingnamepattern)* on page 42. |
| **searchID** | Integer | Specify the search (data source) ID. For information on retrieving data source IDs, refer to *GET: Get Case Data Source Using Name (getcasedatasourceusingname) on page 21*. |

### Response Schema Fields

None.

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## POST: Download Workflow Audit Report (downloadWorkflowAuditReport)

Download a workflow audit report for a case. This presents details on either Investigation Request Workflow actions or on Case Survey-related actions taken in the ZL Discovery Manager application. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **taskType**<br>**subTaskType** | String | Use the **taskType** field to specify the task type:<br>• **investigation:** Audit trail data for the Investigation Request Workflow.<br>• **survey:** Audit trail data for Case Surveys.<br>Use the **subTaskType** field to specify the action type:<br>• **created:** Audit trail data for items being created.<br>• **updated:** Audit trail data for items being updated. |
| **idCase** | Integer | Specify the case ID. |
| **dateStart**<br>**dateEnd** | String | The start date and end date for the report (inclusive). Audit trail data for this date range will be included in the report. |

### Response Schema Fields

None.

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# Discovery/Roles

In the Discovery Manager, a role is an application or department-level set of permissions that determines what users can access and what actions users can perform in the application. All ZL UA roles can be assigned to users by administrators from the Unified Archival Admin (UAA) module, and the eDiscovery-related roles described in this appendix can also be assigned with the Discovery Manager.

Roles can be assigned globally, or for a specific department(s). For example, a Global Discovery Manager role would enable the user's assigned role for all cases. A Discover Manager role for a specific department would restrict the user's role to the cases defined within that department. A case's department can be defined during case setup.

The following sections describe the Discovery/Roles endpoints available in the REST API. Use these endpoints to grant and manage roles within a case:

- *PUT: Grant User Roles (grantroles)*
- *PUT: Revoke User Roles (revokeroles)*

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## PUT: Grant User Roles (grantroles)

Grant roles to a user.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to grant roles to. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **User Roles:** The remaining input is an array of fields defining the roles to be granted. Specify the following for each **userRole** entry: | | |
| **roleId** | Integer | The role ID. For information on obtaining role IDs, refer to the following sections:<br>• *GET: Get All Custom Roles* on page 384<br>• *GET: Get All System Roles* on page 386 |
| **scope** | String | Specify whether the role should be granted globally so that it is applicable to all departments, or if it should be granted to specific departments only:<br>• **Global**: Global<br>• **InclRecur**: On selected departments recursively<br>• **Incl**: On selected departments only |
| **allScopeDomainIds** | Integer | An array of domain IDs to specify the departments the role is applicable to for roles that are only granted on selected departments. These can be retrieved from the ArchiveServer Department Table.<br>Specify the domain IDs as a comma-separated list. For example:<br>`"AllScopeDomainIds": [ 0,1,2,3 ]` |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **additionalProp:** Includes the following fields for each role specified in the request. | | |
| **success** | Boolean | Indicates whether the role was granted successfully (True) or not (False). |
| **result** | String | The result of the request. The string will indicate how the role has been applied (on which departments, scope, role ID, etc). |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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## PUT: Revoke User Roles (revokeroles)

Revoke roles that have been previously assigned to a user.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to modify. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **roles** | Integer | An array of role IDs to specify the roles to be revoked. Specify the role IDs as a comma-separated list. For example:<br>`"Roles": [ 0,1,2,3 ]`<br>For information on obtaining role IDs, refer to the following sections:<br>• *GET: Get All Custom Roles* on page 384<br>• *GET: Get All System Roles* on page 386 |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **additionalProp:** Includes the following fields for each role specified in the request. | | |
| **success** | Boolean | Indicates whether the role was revoked successfully (True) or not (False). |
| **result** | String | The result of the request. If successful, a message will display indicating that the role has been revoked. |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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# EA/Audits

This section describes endpoints you can use to manage Enterprise Analytics audits. This includes endpoints to download and view audit trail data for Enterprise Analytics operations within a workspace*:*

- *POST: Download Workspace Audit Trails (downloadWorkspaceAuditTrail)*
- *GET: Get Audit Action Params (getAuditActionParams)*
- *POST: Get Workspace Audit Trails (getWorkspaceAuditTrail)*

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## POST: Download Workspace Audit Trails (downloadWorkspaceAuditTrail)

Download an audit trail report for a workspace. The audit trail report summarizes the operations that have been performed within the workspace. You can customize the request data to create an audit trail report for all Enterprise Analytics operations, or for specific types of operations.

### Request Parameters

None.

### Request Body Schema Fields

| Field | Type | Description |
|---|---|---|
| **contextId** | Integer | Specify the ID of the workspace for which you want to view the audit trail data. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **actionType** | String | Specify the action type for the report:<br>• **any:** All Enterprise Analytics operations.<br>• **workspace:** Workspace management operations (e.g.. workspace created, workspace edited, workspace deleted).<br>• **tag:** Tag operations (e.g., tag created, tag deleted).<br>• **audit:** Audit operations (e.g., audit trail viewed).<br>• **preservation:** Preservation operations (e.g., preservation viewed).<br>• **item:** Operations affecting files and messages (e.g., tag applied or tag removed).<br>• **search:** Search operations (e.g., saved search viewed).<br>• **export:** Export operations (e.g., search exported).<br>You can specify an action sub-type with the **actionCode** parameter to view a more specific set of operations. |

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| Field | Type | Description |
|---|---|---|
| **actionCode** | String | Specify an action code to identify the action sub-type to be included in the report. This is used in conjunction with the **actionType** field to allow you to generate audit trail data for specific sets of operations.<br><br>For example, if **actionType** is set to **workspace**, you could specify an action code to view audit trail data for workspace creations or workspace deletions.<br><br>Use the GET: Get Audit Action Params endpoint described on page 137 to view the valid action codes for each action type. You can also enter **-1** as the action code to view all operations for the selected action type. |
| **dateStart**<br>**dateEnd** | String | These fields are applicable when the **mode** field is set to **date range,** meaning that the report will include actions performed within a specific date range. Use them to specify the start date and end date (inclusive) for the report. |
| **mode** | String | Set this to any of the following values to determine the date range for the report:<br><br>• **1day**: Actions performed within the last day.<br>• **1week**: Actions performed within the last week.<br>• **1month**: Actions performed within the last 30 days.<br>• **date range**: Actions performed within a specific date range (i.e., the range specified by the **dateStart** and **dateEnd** parameters). |
| **outputDir** | String | Specify the directory in which the audit trail report should be generated. For example:<br><br>`C:\\Users\\adunna\\Downloads\\EA` |

### Response Schema Fields

The response includes a string indicating whether the audit trail report was generated successfully.

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## GET: Get Audit Action Params (getAuditActionParams)

Retrieve action codes for the Enterprise Analytics module. You will use these codes to specify the **actionCode** parameter when using the POST: Download Workspace Audit Trails and POST: Get Workspace Audit Trails endpoints to generate audit trail data. This will allow you to generate audit trail data for very specific sets of operations.

| Parameter | Type | Description |
|---|---|---|
| **auditType** | String | Specify the type of action you want to view the action codes for:<br>• **any:** All Enterprise Analytics operations.<br>• **workspace:** Workspace management operations.<br>• **tag:** Tag operations.<br>• **audit:** Audit operations.<br>• **preservation:** Preservation operations.<br>• **item:** Operations affecting files or messages.<br>• **search:** Search operations.<br>• **export:** Export operations. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **actionDescription** | String | A description of the action sub-type. |
| **actionCode** | Integer | The action code for the sub-type. Use this to specify the **actionCode** parameter when using the POST: Download Workspace Audit Trails and POST: Get Workspace Audit Trails endpoints to generate audit trail data. |

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## POST: Get Workspace Audit Trails (getWorkspaceAuditTrail)

View audit trail data for a workspace. You can customize the request data to create an audit trail report for all Enterprise Analytics operations, or for specific types of operations.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **contextId** | Integer | Specify the ID of the workspace for which you want to view the audit trail data. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **actionType** | String | Specify the action type for the report:<br>• **any:** All Enterprise Analytics operations.<br>• **workspace:** Workspace management operations (e.g.. workspace created, workspace edited, workspace deleted).<br>• **tag:** Tag operations (e.g., tag created, tag deleted).<br>• **audit:** Audit operations (e.g., audit trail viewed).<br>• **preservation:** Preservation operations (e.g., preservation viewed).<br>• **item:** Operations affecting files and messages (e.g., tag applied or tag removed).<br>• **search:** Search operations (e.g., saved search viewed).<br>• **export:** Export operations (e.g., search exported).<br>You can specify an action sub-type with the **actionCode** parameter to view a more specific set of operations. |

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| Parameter | Type | Description |
|---|---|---|
| **actionCode** | String | Specify an action code to identify the action sub-type to be included in the report. This is used in conjunction with the **actionType** field to allow you to generate audit trail data for specific sets of operations.<br>For example, if **actionType** is set to **workspace**, you could specify an action code to view audit trail data for workspace creations or workspace deletions.<br>Use the GET: Get Audit Action Params endpoint described on page 137 to view the valid action codes for each action type. You can also enter **-1** as the action code to view all operations for the selected action type. |
| **dateStart**<br>**dateEnd** | String | These fields are applicable when the **mode** field is set to **date range,** meaning that the report will include actions performed within a specific date range. Use them to specify the start date and end date (inclusive) for the report. |
| **mode** | String | Set this to any of the following values to determine the date range for the report:<br>• **1day**: Actions performed within the last day.<br>• **1week**: Actions performed within the last week.<br>• **1month**: Actions performed within the last 30 days.<br>• **date range**: Actions performed within a specific date range (i.e., the range specified by the **dateStart** and **dateEnd** parameters). |

### Response Schema Fields

The response includes an entry for each action taken upon the workspace that matches the request schema. Each entry includes the following information.

| Parameter | Type | Description |
|---|---|---|
| **workspaceName** | String | The name of the workspace upon which the action was taken. |
| **action** | String | The action taken upon the workspace. |
| **datePerformed** | String | The date and time the action was performed. |
| **user** | String | The user who performed the action. |
| **contextId** | Integer | The workspace ID. |

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| Parameter | Type | Description |
|---|---|---|
| **itemId** | Integer | The ID of the object upon which the action was taken. The object could be a file, a message, a workspace, a search, or a tag, depending on which action types you are viewing. |
| **sourceIp** | String | The IP address of the machine from which the user performed the action. |
| **destinationIp** | String | The IP address of the ZL application server running the Enterprise Analytics module. |
| **comments** | String | Additional information about the action. This varies depending on the action. For example, an action affecting a search would include the name of the search here. |

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# EA/Exports

This section describes endpoints you can use to manage Enterprise Analytics exports. This includes endpoints to start and re-start an export, retrieve export task statuses, and view export-related data:

- *POST: Export Workspace Items (exportWorkspaceItems)*
- *GET: Generate Export Manifest Report (generateExportManifestReport)*
- *GET: Generate Export Report (generatepreExportReport)*
- *GET: Get Export Task Summary (getExportTaskSummary)*
- *POST: Get All Export Tasks (getAllExportTasksUsingWorkspaceId)*
- *PUT: Re-start Export (restartExportUsingId)*

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## POST: Export Workspace Items (exportWorkspaceItems)

Export a search or a data source from a workspace. The export file will be generated in the folder specified for the **Default Export Directory** system registry setting in the SysAdmin module. For more information on this registry setting, contact your System Administrator or refer to the *Configuration* chapter of the *ZL System Administrator's Guide.*

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **exportFileType** | String | Specify the export file type: **JSON** or **APF**. |
| **exportFileName** | String | Specify the name of the export file. |
| **removeDuplicateBasicHeaders** | Boolean | Set to True to remove duplicate basic headers from the export. |
| **removeDuplicateEnvelopeHeaders** | Boolean | Set to True to remove duplicate content envelope headers from the export. |
| **notifyUser** | Boolean | Set to True to send an e-mail notifications when the export completes. Use the **userAddress** field to specify the e-mail address to send the notifications to. |
| **userAddress** | String | If **notifyUser** is set to True, specify the e-mail address to send the export notification to. |
| **workspaceId** | Integer | The ID of the workspace containing the search or data source to be exported. You can use the *GET: Get Workspace Using Name* and *POST: Get Workspace Using ID* endpoints described previously to retrieve workspace ID values and other configuration data. The *POST: Get Workspace Using ID* endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |

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| Schema Field | Type | Description |
|---|---|---|
| **exportType** | String | Enter either of the following:<br>• **DATASOURCE**<br>• **SAVEDSEARCH**<br>A data source is a search used to create or add data to a workspace. A saved search is a workspace filter that has been created and saved for use within the Enterprise Analytics module. |
| **datasourceId** | String | This field is applicable when **exportType** is set to **DATASOURCE.**<br>Specify the ID of the data source you want to export. You can use the POST: Get All Data Sets Using Workspace ID endpoint described on page 167 to retrieve ID values for the data sources that are available within the workspace. |
| **searchName** | String | This field is applicable when **exportType** is set to **SAVEDSEARCH.**<br>Specify the name of the search you want to export. You can use the POST: Get All Data Sets Using Workspace ID endpoint described on page 167 to retrieve the names of saved searches that are available within the workspace. |
| **sortField** | String | Specify which field the export data should be sorted by:<br>• **lastModified:** Sort by file last modified date.<br>• **createDate:** Sort by file creation date.<br>• **relevancy:** Sort by file relevancy, a rating of how closely each file matched the search parameters.<br>• **size:** Sort by file size. |
| **ascending** | Boolean | Set to True to sort the export data in ascending order by **sortFiled**, or False to sort the export data in descending order by **sortField**. |
| **numberOfItemsToExport** | Integer | Specify the maximum number of items to export. |

### Response Schema Fields

The response includes a string indicating whether the export was initiated successfully, as well the task key assigned to the export. You can view its status with the POST: Get All Export Tasks endpoint described on page 148, or with the GET: Get Task Status (getTaskStatus) endpoint described on page 171.

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## GET: Generate Export Manifest Report (generateExportManifestReport)

Generate the Export Manifest Report. This is an Excel spreadsheet listing the items that were successfully included in an export. Note that successfully exported items are added into this file in groups of 100. This means that if the export operation is aborted, the set of additional successfully exported items beyond the last 100 successfully exported items may not appear in the list.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **exportTaskId** | Integer | Specify the ID of the export you want to generate the Export Manifest Report for. You can retrieve export task IDs with the POST: Get All Export Tasks endpoint described on page 148. |
| **outputDirectory** | String | Specify the directory in which the Export Manifest should be generated. For example:<br>`C:\\Users\\adunna\\Downloads\\ExportManifest` |

### Request Body Schema Fields

None.

### Response Schema Fields

The response includes a string indicating whether the Export Manifest Report was generated successfully.

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## GET: Generate Pre-Export Task Report (generatepreExportReport)

Generate the Export Report. This is an Excel spreadsheet summarizing the files that were included in an export.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **exportTaskId** | Integer | Specify the ID of the export you want to generate the Export Manifest Report for. You can retrieve export task IDs with the POST: Get All Export Tasks endpoint described on page 148. |
| **pendingOnly** | Boolean | Set to True to only include information for pending items in the report. Pending items are files or messages that were not included in the export for any reason. |
| **outputDirectory** | String | Specify the directory in which the Export Manifest should be generated. For example:<br>`C:\\Users\\adunna\\Downloads\\ExportReport` |

### Request Body Schema Fields

None.

### Response Schema Fields

The response includes a string indicating whether the Export Report was generated successfully.

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## GET: Get Export Task Summary (getExportTaskSummary)

View details summarizing an export.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **exportTaskId** | Integer | Specify the ID of the export you want to view details for. You can retrieve export task IDs with the POST: Get All Export Tasks endpoint described on page 148. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **taskId** | Integer | The ID assigned to the export. |
| **exportName** | String | The export file name. |
| **status** | String | The status of the export (e.g., Success, Running, Processing). |
| **type** | String | The file type generated for the export (e.g., JSON or Parquet). |
| **totalExportCount** | Integer | The total number of items returned by the search being exported. |
| **successfulExportCount** | Integer | The number of items successfully exported. |
| **alreadyExportedCount** | Integer | The number of items returned by the search that had been previously exported. |
| **errorCount** | Integer | The number of items that were not successfully exported. |
| **startDate**<br>**endDate** | String | The date and time that the export was started, and the date and time that is completed. |
| **exportLocation** | String | The location of the export file. |
| **lastUpdated** | String | The date and time that the export file was last updated. |

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| Schema Field | Type | Description |
|---|---|---|
| **duplicatesCount** | Integer | The number of duplicate items in the export file. Duplicates are items that have identical header information and contents and have matching ZL IDs. This status indicates duplicate items that have been found within the same data source. |
| **nearDuplicatesCount** | Integer | The number of messages in the search that were identified as near duplicates. Near duplicates are items that have identical header information and contents, but do not have matching ZL IDs. This status indicates duplicate items that have been found within different data sources. |
| **totalSizeOfExportedItemsinKb** | Integer | The total size of the items that were successfully exported, in kilobytes. |
| **previouslyExportedCount** | Integer | The number of items returned by the search that had been previously exported. |
| **excessCount** | Integer | The number of items included in the export that were added to this export because a previous export task had failed to include them. |
| **taskInitiator** | String | The email address of the user who initiated the export. |
| **notifiedUsers** | String | The email addresses of any users who were notified about the export. |
| **exportTaskQuery** | String | A string representing the query used to generate the export. |
| **contextId** | Integer | The workspace ID from which the export was generated. |

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## POST: Get All Export Tasks (getAllExportTasksUsingWorkspaceId)

Obtain the status of export tasks that were previously run upon a workspace.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **workspaceId** | String | The ID of the workspace to be viewed. You can use the *GET: Get Workspace Using Name* and *POST: Get Workspace Using ID* endpoints described previously to retrieve workspace ID values and other configuration data. The *POST: Get Workspace Using ID* endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **startDate**<br>**endDate** | Integer | Use the fields to specify the start and end date of a time range. The endpoint will return the status of export tasks which were initiated during this time. |

### Response Schema Fields

The endpoint returns the following fields for each export task that was executed for the workspace during the specified date range.

| Schema Field | Type | Description |
|---|---|---|
| **taskId** | Integer | The export task ID. |
| **exportName** | String | The name of the export file. |
| **status** | String | The status of the export (e.g., Success, Running, Processing). |
| **type** | String | The file type generated for the export (e.g., JSON or Parquet). |
| **totalExportCount** | Integer | The number of items included in the export. |

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| Schema Field | Type | Description |
|---|---|---|
| **sucessfulExportCount** | Integer | The number of items successfully exported. |
| **alreadyExportedCount** | Integer | The number of items that had been previously exported. |
| **errorCount** | Integer | The number of errors which occurred during the export. |
| **startDate endDate** | String | The date and time that the export task started and ended. |

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## PUT: Re-start Export (restartExportUsingId)

Re-start an export.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **exportTaskId** | Integer | Specify the ID of the export to be re-started. You can retrieve export task IDs with the POST: Get All Export Tasks endpoint described on page 148. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns a string indicating whether the export was re-started successfully. You can view the status of the restart with the POST: Get All Export Tasks endpoint described on page 148.

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# EA/Preservation

The Enterprise Analytics module includes the preservation workflow, which you can use to save file and message data into preservations and place them on legal hold. Once placed on legal hold, the data cannot be removed from the ZL Vault.

## GET: Get All Selective Archiving Searches Using Workspace ID (getAllSelectiveArchivingSearchesUsingId)

Use this endpoint to retrieve information about the selective archiving searches that have been initiated in a workspace. A selective archiving search is initiated within a workspace when you add data to a workspace and choose to preserve that data. The selective archiving search is used to build the preservation.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |
| **workspaceId** | String | The ID of the workspace to be viewed. You can use the *GET: Get Workspace Using Name* and *POST: Get Workspace Using ID* endpoints described previously to retrieve workspace ID values and other configuration data. The *POST: Get Workspace Using ID* endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |

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### Request Body Schema Fields

None.

### Response Schema Fields

The response includes an entry for each preservation which has been initiated within the specified workspace. Each entry includes the following information.

| Schema Field | Type | Description |
|---|---|---|
| **searchId**<br>**dataSourceId** | Integer | The **dataSourceId** represents the ID value assigned to a search that was conducted and then preserved. The **searchId** represents the ID value assigned to the selective archive search that was initiated during preservation of data source. |
| **searchName** | String | The name of the preservation. |

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# EA/Workspace

This section describes endpoints you can use to retrieve information regarding Enterprise Analytics workspaces and data sources:

- *DELTE: Delete Workspace (deleteWorkspace)*
- *POST: Get Data Source Using Context ID (getDataSourceUsingContextId)*
- *POST: Get Data Source Using ID (getDataSourceUsingId)*
- *GET: Get Data Source Using Name (getDataSourceUsingName)*
- *POST: Get Workspace Using ID (getWorkspaceUsingId)*
- *GET: Get Workspace Using Name (getWorkspaceUsingName)*

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## DELTE: Delete Workspace (deleteWorkspace)

Delete a workspace.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **contextId** | Integer | The ID of the workspace to be deleted. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns a string indicating whether the workspace was deleted successfully.

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## POST: Get Data Source Using Context ID (getDataSourceUsingContextId)

Retrieve the configuration of a data source (i.e., a search used to build or add data to a workspace) by specifying the ID of the workspace the data source belongs to.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of IDs to specify the workspaces whose data sources are to be retrieved. If you specify an ID for which there is no workspace created, it will skip that ID. If all the specified IDs are invalid, an error will be generated. If you do not provide any input, then the configurations of the data sources for all workspaces will be retrieved and displayed in a list format.<br><br>You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **success** | Boolean | Will be set to True if the data was retrieved successfully. In this case, the **result** array will include details for each data source included within the specified workspaces.<br>Will be set to False if the data was not retrieved successfully. In this case, the **error** parameter will include information on the exception which occurred. |
| **result** | Array | If the data was retrieved successfully (meaning that **success** is set to True), the **result** array includes an entry for each data source included in the specified workspace(s). Each entry includes the following fields: |
| **sourceId** | Integer | The ID assigned to the data source. |
| **contextId** | Integer | The workspace ID. |
| **searchName** | String | The name of the search. |
| **createDate**<br>**updateDate**<br>**lastExportDate** | String | The date and time the data source was created, last updated and last exported. |
| **hitCount** | Integer | The number of items returned by the search used to create the data source. |
| **error** | Array | If the data was not retrieved successfully (meaning that **success** is set to False), then the **message** and **exception** strings include details about the error that occurred. |

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## POST: Get Data Source Using ID (getDataSourceUsingId)

Retrieve the configuration of a data source (i.e., a search used to build or add data to a workspace) by specifying the data source ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of IDs to specify the data sources whose configurations are to be retrieved. If you specify an ID for which there is no data source created, it will skip that ID. If all the specified IDs are invalid, an error will be generated. If you do not provide any input, then the configurations of all data sources will be retrieved and displayed in a list format.<br>You can use the POST: Get Data Source Using Context ID endpoint described on page 155 to retrieve data source ID values. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **success** | Boolean | Will be set to True if the data was retrieved successfully. In this case, the **result** array will include details for each data source included within the specified workspaces.<br>Will be set to False if the data was not retrieved successfully. In this case, the **error** parameter will include information on the exception which occurred. |
| **result** | Array | If the data was retrieved successfully (meaning that **success** is set to True), the **result** array includes an entry for each data source included in the specified workspace(s). Each entry includes the following fields: |
| **sourceId** | Integer | The ID assigned to the data source. |
| **contextId** | Integer | The workspace ID. |
| **searchName** | String | The name of the search. |
| **createDate**<br>**updateDate**<br>**lastExportDate** | String | The date and time the data source was created, last updated and last exported. |
| **hitCount** | Integer | The number of items returned by the search used to create the data source. |
| **error** | Array | If the data was not retrieved successfully (meaning that **success** is set to False), then the **message** and **exception** strings include details about the error that occurred. |

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## GET: Get Data Source Using Name (getDataSourceUsingName)

Retrieve the configuration of a data source (i.e., a search used to build or add data to a workspace) by specifying the data source name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **workspaceId** | Integer | The ID of the workspace whose configuration is to be retrieved. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **dataSourceName** | String | Enter the name of the data source whose configuration is to be retrieved. You can use the POST: Get Data Source Using Context ID endpoint described on page 155 to retrieve data source names. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Fie | Type | Description |
|---|---|---|
| **sourceId** | Integer | The ID assigned to the data source. |
| **contextId** | Integer | The workspace ID. |
| **searchName** | String | The name of the search. |
| **createDate**<br>**updateDate**<br>**lastExportDate** | String | The date and time the data source was created, last updated and last exported. |
| **hitCount** | Integer | The number of items returned by the search used to create the data source. |

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## POST: Get Workspace Using ID (getWorkspaceUsingId)

Retrieve the configuration of a workspace by specifying its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of IDs to specify the workspaces whose configurations are to be retrieved. If you specify an ID for which there is no workspace created, it will skip that ID. If all the specified IDs are invalid, an error will be generated. If you do not provide any input, then the configurations of all the workspaces will be retrieved and displayed in a list format.<br><br>You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **success** | Boolean | Will be set to True if the data was retrieved successfully. In this case, the **result** array will include details for each of the specified workspaces.<br>Will be set to False if the data was not retrieved successfully. In this case, the **error** parameter will include information on the exception which occurred. |
| **result** | Array | If the data was retrieved successfully (meaning that **success** is set to True), the **result** array includes an entry for each of the specified workspace(s). Each entry includes the following fields: |
| **contextName** | String | The name of the workspace. |
| **contextId** | Integer | The workspace ID. |
| **contextDescription** | String | The description entered when the workspace was created. |
| **contextType** | String | The type of workspace (i.e., mails or files). |
| **contextMode** | String | Indicates whether the workspace is a full workspace or a lite workspace. A full workspace includes all functionalities, including viewing and exporting messages, applying or removing tags, filtering data and saving filters, viewing audit report data, and the use of the preservation workflow. A lite workspace includes less functionality. You can primarily use lite workspaces to view, filter and export messages and view audit data. |
| **createDate**<br>**lastAccessedDate** | String | The date and time the workspace was created and last accessed. |
| **contextSearchStoreType** | Integer | A value identifying the search store used to build the workspace: The following values may be returned:<br>• **1**: In-Place Mail Journal Search<br>• **2**: In-Place Mail Journal Archive Search<br>• **9**: In-Place Mail Search<br>• **50**: File Archive Search<br>• **53**: In-Place File Search |

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| Schema Field | Type | Description |
|---|---|---|
| **error** | Array | If the data was not retrieved successfully (meaning that **success** is set to False), then the **message** and **exception** strings include details about the error that occurred. |

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## GET: Get Workspace Using Name (getWorkspaceUsingName)

Retrieve the configuration of a workspace by specifying its name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **workspaceName** | String | Enter the name of the workspace whose configuration is to be retrieved. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace names. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **contextName** | String | The name of the workspace. You can use the *POST: Get Workspace Using ID* endpoint described on page 160 to retrieve a list of workspace names. |
| **contextId** | Integer | The workspace ID. |
| **contextDescription** | String | The description entered when the workspace was created. |
| **contextType** | String | The type of workspace (i.e., mails or files). |
| **contextMode** | String | Indicates whether the workspace is a full workspace or a lite workspace. A full workspace includes all functionalities, including viewing and exporting messages, applying or removing tags, filtering data and saving filters, viewing audit report data, and the use of the preservation workflow. A lite workspace includes less functionality. You can primarily use lite workspaces to view, filter and export messages and view audit data. |
| **createdDate**<br>**lastAccessedDate** | String | The date and time the workspace was created and last accessed. |

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| Schema Field | Type | Description |
|---|---|---|
| **contextSearchStoreType** | Integer | A value identifying the search store used to build the workspace: The following values may be returned:<br>• **1**: In-Place Mail Journal Search<br>• **2**: In-Place Mail Journal Archive Search<br>• **9**: In-Place Mail Search<br>• **50**: File Archive Search<br>• **53**: In-Place File Search |

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# EA/Search

This section describes endpoints you can use to delete or retrieve information regarding Enterprise Analytics data sets (i.e., data sources, saved filters and Dataset Manipulations)*:*

- *DELTE: Delete Saved Search (deleteSavedSearch)*
- *POST: Get All Data Sets Using Workspace ID (getAllDataSetUsingId)*

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## DELTE: Delete Saved Search (deleteSavedSearch)

Delete a saved search (i.e., a workspace filter that has been created and saved for use within the Enterprise Analytics module).

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **contextId** | Integer | The ID of the workspace containing the saved search to be deleted. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **searchName** | String | The name of the saved search to be deleted. You can use the POST: Get Data Source Using Context ID endpoint described on page 155 to retrieve search names. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns a string indicating whether the search was deleted successfully.

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## POST: Get All Data Sets Using Workspace ID (getAllDataSetUsingId)

Retrieve the configuration of the data sets that have been added to a workspace by specifying the ID of the workspace. The endpoint returns details for all data sets that have been added to workspace. A data set can be either a saved search, a data source or a dataset manipulation:

- **Data Source**: A search used to create or add data to a workspace.
- **Saved Search**: A workspace filter that has been created and saved for use within the Enterprise Analytics module.
- **Dataset Manipulation**: A dataset manipulation that has been created for use with the Enterprise Analytics module.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |
| **workspaceId** | Integer | Enter the ID of the workspace you want to view. You can use the *GET: Get Workspace Using Name* and *POST: Get Workspace Using ID* endpoints described previously to retrieve workspace ID values and other configuration data. The *POST: Get Workspace Using ID* endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns the following fields for each data set included within the specified workspace(s).

| Schema Field | Type | Description |
|---|---|---|
| **name** | String | The name of the data set. |
| **id** | Integer | The ID assigned to the data set. |
| **createDate** | String | The date and time the data set was created. |

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| Schema Field | Type | Description |
|---|---|---|
| **itemCount** | Integer | The number of items returned by the data set. |
| **type** | String | Indicates the type of data set: **DATASOURCE, SAVED FILTER** or **DATASETMANIPULATION.** |
| **searchType** | String | Set to **CUSTOM** for saved workspace filters and **DATASETMANIPULATION** for dataset manipulations. Not applicable for data sources. |

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# EA/Tasks

This section describes endpoints you can use to view Enterprise Analytics export task statuses:

- *POST: Get Previous Task Status (getPreviousTaskStatus)*
- *GET: Get Task Status (getTaskStatus)*

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## POST: Get Previous Task Status (getPreviousTaskStatus)

Obtain the status of export tasks that were previously executed within a workspace.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **idContext** | Integer | The ID of the workspace to be viewed. You can use the *GET: Get Workspace Using Name* and *POST: Get Workspace Using ID* endpoints described previously to retrieve workspace ID values and other configuration data. The *POST: Get Workspace Using ID* endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **taskType** | String | Read-only. Select **Export.** |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns the following fields for each export task.

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The ID assigned to the export task. |
| **taskName** | String | The export task name. |
| **getPid** | Integer | The process ID assigned to the export task. |
| **startDate**<br>**endDate** | String | The date and time that the export task started and ended. |
| **status** | String | The status of the export task. |
| **message** | String | Additional information regarding the export task. |

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## GET: Get Task Status (getTaskStatus)

Obtain the status of export tasks that were run within a workspace.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **taskKey** | String | Enter the task key value for the export you want to view. You can generate exports with the *POST: Export Workspace Items (exportWorkspaceItems)* endpoint, and the task key assigned to the export will be included in the response schema returned by the endpoint. For more information, refer to *POST: Export Workspace Items (exportWorkspaceItems)* on page 142. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns the following fields for each task.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **key** | String | The task key. |
| **taskName** | String | The task name. |
| **startTime**<br>**endTime** | Integer | The time that the task started and ended. These times are delivered as epoch timestamps. For more information on epoch timestamps, refer to:<br>https://www.epochconverter.com/ |
| **elapsedTime** | Integer | The amount of time the task has taken, in milliseconds. |
| **taskSuccess** | Boolean | Set to True if the task has completed successfully. |
| **taskMessage** | String | A message describing the current status of the task. |
| **taskErrorMessage** | String | A message describing any error conditions which occurred. |
| **known** | Boolean | Indicates whether it is a known task (True) or not (False). |
| **pid** | String | The process ID assigned to the task. |

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# EA/Tags

Tags are customizable labels that can be applied to messages and files in the Enterprise Analytics module for various purposes. For example, you could apply tags to messages and files that are relevant to specific legal matter, or to messages and files that were returned by a search. Tags can be created as global tags that can applied to any workspace when it is created, or as workspace-specific tags that can be applied to a single workspace at any time after its creation.

This section describes endpoints that you can use to manage tags:

- *POST: Create Tag (createTag)*
- *DELETE: Delete Tag Using ID (deleteTagUsingId)*
- *POST: Get Tags Using ID (getTagsUsingId)*
- *PUT: Update Tag (updateTag)*

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## POST: Create Tag (createTag)

Create a tag.

### Request Parameters

None.

### Request Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **name** | String | The name of the tag. |
| **description** | String | A description of the tag. |
| **tagParentId** | String | The ID of the parent tag. The tag will be created beneath the parent tag in the hierarchy. You can retrieve tag IDs with the GET: Get All Tags of a Project (getalltagsofaproject) endpoint described on page 426.<br>Enter **-1** if the tag should not be created beneath any other tags. |
| **contextId** | Integer | To create a global tag, enter **0**.<br>To create a workspace-specific tag, enter the ID of the workspace the tag should be added to. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **root** | Boolean | Set to True when creating a global tag, or False when creating a workspace-specific tag. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **name** | String | The internal name of the tag. |
| **description** | String | A description of the tag. |
| **tagParentId** | String | The ID of the tag's parent tag. |
| **contextId** | Integer | The ID of the workspace to which the tag was added. |
| **root** | Boolean | If True, the tag is the root level tag. |

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| Schema Field | Type | Description |
|---|---|---|
| **tagId** | Integer | The ID assigned to the tag. |
| **tagDisplayName** | String | The display name assigned to the tag. This will match the internal name. |
| **tagCreateDate** | String | The date and time that the tag was created. |

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## DELETE: Delete Tag Using ID (deleteTagUsingId)

Delete a tag.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of IDs to specify the tags to be deleted. You can retrieve tag IDs with the GET: Get All Tags of a Project (getalltagsofaproject) endpoint described on page 426. |
| **root** | Boolean | Set to True when deleting a global tag, or False when deleting a workspace-specific tag, or to. |
| **contextId** | Integer | To delete a global tag, enter **0**.<br>To delete a workspace-specific tag, enter the ID of the workspace the tag should be added to. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **parentTagId** | String | Set this value **-1**. |

### Request Schema Fields

None.

### Response Schema Fields

A string indicating whether the tag was deleted successfully.

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## POST: Get Tags Using ID (getTagsUsingId)

Retrieve the configurations of tags that have been created within a specific workspace.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of IDs to specify the tags whose configurations are to be retrieved. If this field is left empty, the response will include information for all tags included in the area specified by the **contextId** field. |
| **Root** | Boolean | Not required. Leave this as an empty string. |
| **contextId** | Integer | To retrieve the configuration of a global tag(s), enter **0**.<br>To retrieve the configuration of a workspace-specific tag(s), enter the ID of the workspace the tag should be added to. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **parentTagId** | String | Set this value to **-1**. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Tag Entries:** The endpoint returns an entry for each tag specified in the input. The schema fields included in each entry are described below. | | |
| **name** | String | The internal name of the tag. |
| **description** | String | A description of the tag. |

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| Schema Field | Type | Description |
|---|---|---|
| **tagParentId** | String | The ID of the tag's parent tag. |
| **contextId** | Integer | The ID of the workspace to which the tag was added. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **root** | Boolean | If True, the tag is a root level tag. |
| **tagId** | Integer | The ID assigned to the tag. |
| **tagDisplayName** | String | The display name assigned to the tag. This will match the internal name. |
| **tagCreateDate** | String | The date and time that the tag was created. |

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## PUT: Update Tag (updateTag)

Update the configuration of a tag (i.e., the name, description or parent tag assigned to the tag).

### Request Parameters

None.

### Request Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **name** | String | The name to assign to the tag. |
| **description** | String | The description to assign to the tag. |
| **tagParentId** | String | The ID of the parent tag. The tag will be placed beneath the parent tag in the hierarchy. You can retrieve tag IDs with the GET: Get All Tags of a Project (getalltagsofaproject) endpoint described on page 426.<br>Enter **-1** if the tag should not be placed beneath any other tags. |
| **contextId** | Integer | To update the configuration of a global tag, enter **0**.<br>To update the configuration of a workspace-specific tag, enter the ID of the workspace the tag should be added to. You can use the *POST: Get Workspace Using ID* endpoint on page 160 to retrieve workspace ID values and other configuration data. This endpoint includes an option to return data for all workspaces in a single operation, which could be useful when retrieving ID values. |
| **root** | Boolean | Set to True when updating a global tag, or False when updating a workspace-specific tag. |
| **tagId** | Integer | Specify the ID assigned to the tag when it was created. You can retrieve tag IDs with the GET: Get All Tags of a Project (getalltagsofaproject) endpoint described on page 426. |
| **tagDisplayName** | String | Not required. Leave at the default value. |
| **tagCreateDate** | String | Not required. Leave at the default value. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **name** | String | The name of the tag. |

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| Schema Field | Type | Description |
|---|---|---|
| **description** | String | A description of the tag. |
| **tagParentId** | String | The ID of the tag's parent tag. |
| **contextId** | Integer | The ID of the workspace to which the tag was added. |
| **root** | Boolean | If True, the tag is a root level tag. |
| **tagId** | Integer | The ID assigned to the tag. |
| **tagDisplayName** | String | The display name assigned to the tag. |
| **tagCreateDate** | String | The date and time that the tag was created. |

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# EFM/Disposition

Disposition is the process by which files whose records management lifecycle has expired are deleted and removed from the ZL UA system. The Disposition Workflow includes the following steps:

- Disposition is enabled in a project. When enabling the Disposition Workflow, the Project Administrator also schedules Disposition Runs. During the Disposition Run, files whose lifecycle have expired are permanently deleted from ZL UA and the source server.
- You can also create manual (ad-hoc) Disposition Runs for projects that do not have scheduling enabled for the Disposition Workflow (or if you want to add an additional Disposition Run to a project with scheduling enabled).
- Before each Disposition Run, the system determines which files in the project are eligible for disposition and creates a Disposition Approval Requests for those files. The request must be approved before the Disposition Run can start. The approval process includes an option to exclude specific files from a Disposition Run during the approval process.
- After the Disposition Approval Request is approved, the Disposition Runs can be executed.

The following sections describe the EFM/Dispostion endpoints available in the REST API. Use these endpoints to manage the Disposition Workflow*:*

- *PUT: Approve Disposition Run (approveDisposition)*
- *PUT: Cancel Disposition Run (cancelDispositionRun)*
- *POST: Create Manual Disposition Run (createAdHocDisposition)*
- *POST: Create Disposition Rollover Run (createDispositionRolloverRun)*
- *PUT: Exclude Items from Disposition Run (excludeItemsFromDisposition)*
- *POST: Get Disposition Run Information (getDispositionRunsUsingProjectId)*
- *GET: Get Disposition Run Status (getDispositionTaskStatus)*
- *POST: Get Expired Files List (getExpiryFileItems)*
- *POST: Start Disposition Run (runDisposition)*

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## PUT: Approve Disposition Run (approveDisposition)

Approve a Disposition Run.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project containing the Disposition Run to be approved. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **runId** | Integer | The ID of the Disposition Run to be approved. You can use the *POST: Get Disposition Run Information (getDispositionRunsUsingProjectId)* endpoint described on page 186 to retrieve Disposition Run IDs.<br>For manual (ad-hoc) Disposition Runs, enter -1. |
| **approvalComment** | String | Enter a comment to be logged with the approval. |

### Response Schema Fields

The response schema includes a string indicating whether the Disposition Run was approved successfully.

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## PUT: Cancel Disposition Run (cancelDispositionRun)

Cancel a Disposition Run.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project containing the Disposition Run to be aborted. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **dispositionRunId** | Integer | The ID of the Disposition Run to be aborted. You can use the *POST: Get Disposition Run Information (getDispositionRunsUsingProjectId)* endpoint described on page 186 to retrieve Disposition Run IDs.<br>For manual (ad-hoc) Disposition Runs, enter -1. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema includes a string indicating whether or not the Disposition Run was aborted successfully.

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## POST: Create Manual Disposition Run (createAdHocDisposition)

Create a manual (ad-hoc) Disposition Run.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project you want to add the Disposition Run to. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **dateStart**<br>**dateEnd** | String | Specify the start date and end date for the Disposition Run. Files whose lifecycle expired during this date range will be included in the Disposition Run. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response includes a string indicating whether the manual Disposition Run was created successfully.

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## POST: Create Disposition Rollover Run (createDispositionRolloverRun)

Create a rollover Disposition Run. Rollover runs may be required when the number of files to be removed in a Disposition Run exceeds the maximum of 1 million items.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project you want to add the Disposition Run to. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **dispositionRunId** | String | The ID of the Disposition Run for scheduled Disposition Runs. You can use the *POST: Get Disposition Run Information (getDispositionRunsUsingProjectId)* endpoint described on page 186 to retrieve Disposition Run IDs. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response includes a string indicating whether the rollover Disposition Run was created successfully.

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## PUT: Exclude Items from Disposition Run (excludeItemsFromDisposition)

Exclude items from a Disposition Run for a project, so that they will not be removed when the next Disposition Run is executed upon the project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project modify. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **fExclude** | Boolean | Set to True to exclude the specified files from the Disposition Run, or False to include them. Please note that all files whose lifecycle expired during the date range specified for a Disposition Run will be included by default. |

### Request Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| List of File IDs | Array | A comma-separated list of IDs for the files you want to exclude. You can use the *POST: Get Expired Files List* described on page 190 to retrieve file IDs. |

### Response Schema Fields

The response includes a string indicating whether the items were successfully excluded.

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## POST: Get Disposition Run Information (getDispositionRunsUsingProjectId)

Retrieve information for the Disposition Runs for a project. The response to the call includes information such as the name of the user who approved the Disposition Run and any comments entered when approving the request.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **filter** | String | Enter a string to identify the type of the Disposition Run you want to retrieve information for. This defaults to **Pending**, which means that information for Disposition Runs within the project that are either pending approval or have been approved and are ready to be executed. Other values include the following:<br>• **expiredRequests**: Expired Disposition Runs. These are Disposition Runs which expired before they were executed.<br>• **done**: Disposition Runs that were executed previously. These are also referred to as past runs.<br>• **all**: All the Disposition Runs for the project. |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Items** | Integer | Enter a comma-separated list of project IDs to specify the projects you want to view. The REST API includes several endpoints that you can use to retrieve the configurations and ID values of your projects. Options are provided to retrieve project configurations by ID, name pattern searches, file server ID, and more.<br>The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |

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### Response Schema Fields

The response schema includes the following information for each Disposition Run. The Disposition Runs will be returned in ascending order and grouped by project ID, with the most recent Disposition Runs for each project being listed first.

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | The project ID. |
| **runId** | Integer | The Disposition Run ID. |
| **approvalComment** | String | Comments entered by the user who approved the Disposition Run. |
| **statusMsg** | String | A string describing the current status of the Disposition Run. |
| **approverFullName** | String | The name of the user who approved the Disposition Run. |
| **approverAddress** | String | The email address of the user who approved the Disposition Run. |
| **dateStart**<br>**dateEnd** | String | The start date and end date for the Disposition Run. Files whose lifecycle expired during this date range are included in the Disposition Run. |
| **approved** | Boolean | Indicates whether the Disposition Run has been approved. |

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## GET: Get Disposition Run Status (getDispositionTaskStatus)

Obtain the status of a Disposition Run.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project containing the Disposition Run to be checked. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **idDisposition** | Integer | The ID of the Disposition Run whose status is to be checked. You can use the *POST: Get Disposition Run Information (getDispositionRunsUsingProjectId)* endpoint described on page 186 to retrieve Disposition Run IDs. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **idDisposition** | Integer | The ID of the Disposition Run whose status is being checked. |
| **idProj** | Integer | The ID of the project containing the Disposition Run whose status is being checked. |
| **approvalRequestId** | Integer | The ID value assigned to the approval request for the Disposition Run. |
| **periodEnd** | String | The date that the retention period for the Disposition Run ended. This is typically the last day of the month in which the Disposition Run was created. |
| **idRetBdb** | Integer | The retention ID assigned to the Disposition Run in BigDB. |
| **dateStart**<br>**dateUpdate**<br>**dateEnd** | String | The date and time that the Disposition Run started and ended, and the date and time that the Disposition Run's status was last updated. |
| **idStatus** | Integer | The ID code assigned to the Disposition Run's current status. |

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| Schema Field | Type | Description |
|---|---|---|
| **statusMsg** | String | A message indicating the status of the Disposition Run. For example, it will report “Approval Request Pending” if the Disposition Run has not been approved. |
| **pid** | Integer | The process ID assigned to the Disposition Run. |

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## POST: Get Expired Files List (getExpiryFileItems)

Retrieve the list of expired files for a project. These are the files whose lifecycle has expired and will be included in the next Disposition Run.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project from which you want to retrieve the information. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **runId** | String | For scheduled Disposition Runs, enter the ID of the Disposition Run ID. You can use the *POST: Get Disposition Run Information (getDispositionRunsUsingProjectId)* endpoint described on page 186 to retrieve Disposition Run IDs.<br>For manual (ad-hoc) Disposition Runs, enter -1. |
| **startDate**<br>**endDate** | String | Specify a start date and end date. Information for files whose lifecycle expired during this date range will be returned. This is not required for scheduled Disposition Runs. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **itemName** | String | The file name. |
| **itemId** | Integer | The ID assigned to the file. |
| **projectId** | Integer | The ID assigned to the project the file belongs to. |
| **expiryDate** | String | The date and time that the file's lifecycle expired. |
| **isfExclude** | Boolean | Indicates whether the file was excluded (True) from the Disposition Run. |
| **recordCategoryId** | Integer | The ID assigned to the file's Record Category. |

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## POST: Start Disposition Run (runDisposition)

Start a Disposition Run.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project containing the Disposition Run to be started. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **idDisposition** | Integer | The ID of the Disposition Run to be started. You can use the *POST: Get Disposition Run Information (getDispositionRunsUsingProjectId)* endpoint described on page 186 to retrieve Disposition Run IDs.<br>For manual (ad-hoc) Disposition Runs, enter -1. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema includes a string indicating whether or not the Disposition Run was started successfully. The string also includes a task ID value you can use to check the status of the Disposition Run with the GET: Get Task Status endpoint. For more information, refer to *GET: Get Task Status* on page 379.

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# EFM/Reports

The following sections describe the EFM/Reports endpoints available in the REST API. Use these endpoints to generate reports summarizing the files that are included in the EFM projects that have been added to your installation:

- *POST: Generate File Manifest Report (generateInPlaceFileManifestReport)*
- *POST: Generate Post-Disposition Report (generateInPlaceFilePostDispositionReport)*

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## POST: Generate File Manifest Report (generateInPlaceFileManifestReport)

Download reports summarizing a project's files. Each report lists the file name, folder name and path of a specific group of files within the project, as well as other file attributes such as the file type, creation and last modification date, size, record category, and disposition eligibility date.

- **Manifest Report**: Lists all files included in the project.
- **Excluded Files Report**: Lists all files that are eligible for disposition within the project but have been excluded.
- **Approved Files Report**: Lists all files that have been approved for disposition within the project.
- **Pre-Disposition Report**: Lists all files that are eligible for disposition within the project.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project for which you want to generate the report. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **reportType** | Array | Select the report you want to generate. |
| **renderer** | Array | Select the report format (**excel** or **csv**). |
| **outputDirectory** | String | Specify the directory in which the report file should be generated. Make sure to specify a valid path. For example:<br>`C:\EFMReports` |

### Request Body Schema Fields

None.

### Response Schema Fields

The response includes a string indicating whether the specified report was generated successfully.

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## POST: Generate Post-Disposition Report (generateInPlaceFilePostDispositionReport)

Download a Post-Disposition Report. The Post Disposition Report lists the file name, folder name and path of the files that were disposed of during a Disposition Run, as well as other file attributes such as the file name and path, folder name, extension and size, record category, retention code and disposition eligibility date.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project for which you want to generate the report. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **idDispRun** | Integer | The ID of the Disposition Run for which the report should be generated. You can use the *POST: Get Disposition Run Information (getDispositionRunsUsingProjectId)* endpoint described on page 186 to retrieve Disposition Run IDs. |
| **renderer** | Array | Select the report format (**excel** or **csv**). |
| **outputDirectory** | String | Specify the directory in which the report file should be generated. Make sure to specify a valid path. For example:<br>`C:\EFMReports` |

### Request Body Schema Fields

None.

### Response Schema Fields

The response includes a string indicating whether the specified report was generated successfully.

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# EFM/Tasks

This section describes endpoints you can use to view Enterprise Files Management task statuses:

- *POST: Get Recategorization Task Status (getRecategorizationTaskStatus)*

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## POST: Get Recategorization Task Status (getRecategorizationTaskStatus)

Obtain the status of recategorization tasks performed upon files (i.e., the application or removal of a Static Tag or the application of a Record Category) that were executed within a project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **iTaskId** | Integer | The ID of the task to be viewed. The task IDs are returned in the response schema when you use the POST: Manually Apply Static Tag, POST: Manually Apply Record Category or POST: Manually Remove Static Tags endpoints to recategorize files. For more information on these endpoints, refer to *EFM/Tags* on page 198. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns the following fields for each export task.

| Schema Field | Type | Description |
|---|---|---|
| **taskId** | Integer | The task ID assigned to the operation. |
| **taskStatus** | String | The result of the operation (e.g., **Success**). |
| **countTotal** | Integer | The total number of files specified in the input to the task. |
| **countUpdated** | Integer | The number of files that were successfully updated. |
| **countNotProcessed** | Integer | The number of files that were not processed. |
| **countFailed** | Integer | The number of files where the update failed (e.g., one of the Static Tags could not be applied or removed to the file). |

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# EFM/Tags

In ZL UA, tags are customizable labels that can be applied to files. Typically, they have been used to categorize files together for various purposes. The Enterprise Files Management (EFM) module expands the concept of tags by introducing *Record Categories* and *Static Tags*.

- **Static Tags:** Static Tags are customizable labels that can be used to categorize files into groups. For example, you could create a Static Tag to apply to all files that include certain keywords, or to all files that were created during a specific timeframe.

  As part of the process of creating Static Tags, you will also create lexicons. Each lexicon specifies one or more content rules. A content rule defines a set of file characteristics. These characteristics will be checked against each file within a project when the project is scanned and its files are ingested into ZL UA. Options are provided to check files for the inclusion or exclusion of specific text phrases in the file contents, file sizes, and more.

  Each content rule also specifies a Static Tag. If a file matches the characteristics defined for a content rule, then the Static Tag associated with the content rule will be applied to that file. Multiple Static Tags can be applied to a single file, so you can create as many content rules as you want.

- **Record Category:** A Record Category defines a file's disposition period (i.e., how long it will be retained within ZL UA before being permanently deleted from ZL UA and the source server). When creating Record Categories, you will also need to create retention codes to define the disposition periods in your system.

The following sections describe the EFM/Projects endpoints available in the REST API. Use these endpoints to create and manage Static Tags, Record Categories, retention codes and lexicons:

- *POST: Create Static Tag (createStaticTag)*
- *PUT: Update Static Tag (updateStaticTag)*
- *POST: Get Static Tags (getStaticTags)*
- *DELETE: Delete Static Tag (deleteStaticTag)*
- *POST: Create Record Category (createRecordCategory)*
- *PUT: Update Record Category (updateRecordCategory)*
- *POST: Get Record Categories (getRecordCategories)*
- *POST: Create Retention Code (createRetentionCode)*
- *PUT: Update Retention Code (updateRetentionCode)*
- *POST: Get Retention Code (getRetentionCode)*
- *DELETE: Delete Retention Code (deleteRetentionCode)*
- *POST: Create Lexicon (createLexicon)*

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- *POST: Get Lexicons (getLexicons)*
- *DELETE: Delete Lexicon (deleteLexicon)*
- *POST: Create Content Rule (createContentRule)*
- *PUT: Update Content Rule (updateContentRule)*
- *POST: Get Content Rules (getContentRules)*
- *DELETE: Delete Content Rule (deleteContentRule)*
- *POST: Manually Apply Static Tag (manuallyApplyStaticTag)*
- *POST: Remove Static Tag (removeStaticTag)*
- *POST: Manually Apply Record Category (manuallyApplyRecordCategory)*

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## POST: Create Static Tag (createStaticTag)

Create a Static Tag.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **tagName** | String | Enter the name of the tag. |
| **description** | String | Enter a description of the tag. |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema, as well as the ID assigned to the tag. These fields define the tag's configuration.

| Schema Field | Type | Description |
|---|---|---|
| **tagName** | String | The name of the tag. |
| **tagId** | Integer | The ID assigned to the tag. |
| **tagDisplayName** | String | The display name assigned to the tag. |
| **deleted** | Boolean | Indicates whether the tag has been deleted (True) or not. |
| **description** | String | The description of the tag. |

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## PUT: Update Static Tag (updateStaticTag)

Update the description of a Static Tag. Use the Static Tag's ID value to identify it.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **tagName** | String | Not required. Leave at the default value. |
| **tagId** | String | Enter the ID assigned to the Static Tag whose description is to be updated. You can retrieve Static Tag configuration and ID values with the POST: Get Static Tags endpoint described in the next section. |
| **tagDisplayName** | String | Not required. Leave at the default value. |
| **deleted** | Boolean | Not required. Leave at the default value. |
| **description** | String | Enter the new description of the tag. |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema, as well as the ID assigned to the tag. These fields define the tag's configuration.

| Schema Field | Type | Description |
|---|---|---|
| **tagName** | String | The name of the tag. |
| **tagId** | Integer | The ID assigned to the tag. |
| **tagDisplayName** | String | The display name assigned to the tag. |
| **deleted** | Boolean | Indicates whether the tag has been deleted (True) or not. |
| **description** | String | The description of the tag. |

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## POST: Get Static Tags (getStaticTags)

Retrieve the configuration of a Static Tag.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of tag IDs to specify the Static Tags whose configurations are to be retrieved. If you specify an ID for which there is no Static Tag created, it will skip that ID. If all the specified IDs are invalid, an error will be generated. If you do not provide any input, then the configurations of all the Static Tags will be retrieved and displayed in a list format. |

### Response Schema Fields

This endpoint returns an entry for each Static tag specified in the input. Each entry includes a series of fields that represent the configuration of the Static Tag. For descriptions of these fields, refer to *POST: Create Static Tag* on page 200.

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## DELETE: Delete Static Tag (deleteStaticTag)

Delete a Static Tag.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **tagId** | Integer | The ID of the Static Tag to be deleted. You can retrieve Static Tag configuration and ID values with the POST: Get Static Tag endpoint described in the previous section. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns a string indicating whether the Static Tag was successfully deleted.

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## POST: Create Record Category (createRecordCategory)

Create a Record Category.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **recordCategoryId** | Integer | Ignore this field when creating a Record Category. Use it to specify the ID of the Record Category being updated when updating with the PUT endpoint.<br><br>You can retrieve Record Category configuration and ID values with the POST: Get Record Category endpoint. For more information, refer to *POST: Get Record Categorys* on page 208. |
| **recordCategoryName** | String | Enter a name of the Record Category. |
| **recordCategoryDescription** | String | Enter a description of the Record Category. |
| **recordCategoryPrefix** | String | Enter a unique prefix identifier for the Record Category. |
| **recordCategoryTriggerFormula** | String | Use any of the following values to specify the start date for the file's retention period:<br>• @fileDate@<br>• @publishDate@<br>• @recordDate@<br>• A value identifying a specific date that is not more than 100 years old or 100 years into the future. Enter the date in MM/dd/yyyy format. For example, May 26th 2025 then should be written as 05/26/2025.<br><br>The file date refers to the date that the file was processed into ZL UA. Please note that for In-Place files, the publish date and record date are set to the date the file was last modified due to the way that ZL UA manages In-Place files internally. |

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| Schema Field | Type | Description |
|---|---|---|
| **recordCategoryRetentionCodeId** | Integer | The ID of the retention code created for the Record Category. You can use the POST: Get Retention Codes endpoint described on page 212 to retrieve retention code ID values.<br>For more information on creating retention codes, refer to *POST: Create Retention Code* on page 209. |
| **archive** | Boolean | Set this to True so that files this Record Category is applied to when they are ingested into ZL UA will be marked for Selective Archiving. This is not applicable to files that the Record Category is manually applied to. |

### Response Schema Fields

| | | |
|---|---|---|
| **recordCategoryId** | Integer | The ID assigned to the Record Category. |
| **recordCategoryName** | String | The name of the Record Category. |
| **recordCategoryDescription** | String | The description of the Record Category. |
| **recordCategoryPrefix** | String | A unique prefix identifier for the Record Category. |
| **recordCategoryTriggerFormula** | String | Use any of the following values to specify the start date for the file's retention period:<br>• @fileDate@<br>• @publishDate@<br>• @recordDate@<br>• A value identifying a specific date.<br>The file date refers to the date that the file was processed into ZL UA. Please note that for In-Place files, the publish date and record date are set to the date the file was last modified due to the way that ZL UA manages In-Place files internally. |
| **recordCategoryRetentionCodeId** | Integer | The ID of the retention code created for the Record Category. For more information on creating retention codes, refer to *POST: Create Retention Code* on page 209. |

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| | | |
|---|---|---|
| **archive** | Boolean | If True, then files this Record Category is applied to when they are ingested into ZL UA will be marked for Selective Archiving. This is not applicable to files that the Record Category is manually applied to. |
| *The remainder of the fields returned by this endpoint include internal information regarding the retention code assigned to the Record Category that are passed in when creating or updating the Record Category. For more information on creating retention codes, refer to POST: Create Retention Code on page 209.* | | |

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## PUT: Update Record Category (updateRecordCategory)

Update a Record Category.

### Request Parameters

None.

### Request Body Schema Fields

The schema fields required to update the Record Category's configuration are the same as those that must be specified when creating it, as described in *POST: Create Record Category* on page 204. You must also specify an ID value to identify the Record Category being updated.

### Response Schema Fields

The schema fields returned when updating the Record Category are the same as those required in the request schema when creating it (or when updating it using this endpoint). They represent the configuration of the Record Category. For descriptions of these fields, refer to *POST: Create Record Category* on page 204.

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## POST: Get Record Categories (getRecordCategories)

Retrieve the configuration of a Record Category.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of ID values identifying the Record Categories whose configurations are to be retrieved. If you specify an ID for which there is no Record Category created, it will skip that ID. If all the specified IDs are invalid, an error will be generated. If you do not provide any input, then the configurations of all the Record Categories will be retrieved and displayed in a list format. |

### Response Schema Fields

This endpoint returns an entry for each Record Category specified in the input. Each entry includes a series of fields that represent the configuration of the Record Category. For descriptions of these fields, refer to *POST: Create Record Category* on page 204.

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## POST: Create Retention Code (createRetentionCode)

Create a retention code to apply to a Record Category.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **retentionCodeId** | Integer | The ID assigned to the retention code being updated. This is only required when updating a retention code with the PUT: Update Retention Code endpoint.<br>You can use the POST: Get Retention Code endpoint to retrieve retention code ID values. For more information, refer to *POST: Get Retention Code* on page 212. |
| **recordStoreId** | Integer | The record store ID to assign to the retention code. You can retrieve retention code IDs from the **RetentionCode** database table. In addition, you can check the **RecordStore** database table to see the recordStore IDs assigned to different tenants. |
| **retentionCodeName** | String | The name of the retention code. |
| **beginSuperseded** | Boolean | Set to True designate that each file the tag is applied to begin its disposition lifecycle only after the record and/or its category/ folder has been superseded (even when the trigger date has already passed). Records that are not superseded or are in an un-superseded category/folder will remain active records until the record and/or its entire category/folder is superseded, at which point the record begins its lifecycle in accordance with the defined disposition properties of the code. |
| **beginDispositionAuthority** | Boolean | Set to True to add Disposition Authority to the code. Disposition Authority tags define the legal authority that allows for disposition to be carried out upon files. They are used for tracking and reporting purposes. |
| **retentionPeriod** | Integer | Specify the retention period for the retention code. Use the **retentionUnit** field described below to specify the units for the retention period. |

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| Schema Field | Type | Description |
|---|---|---|
| **retentionUnit** | String | Specify the retention unit for the retention code: **YEAR**, **WEEK**, **MONTH** or **DAY**<br><br>For example, if **retentionPeriod** is set to 7 and this field is set to **MONTH**, the retention period would be 7 months. |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema, as well as the ID that has been assigned to the retention code. These fields define the retention code's configuration.

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## PUT: Update Retention Code (updateRetentionCode)

Update a retention code's configuration.

### Request Parameters

None.

### Request Body Schema Fields

The schema fields required to update the retention code's configuration are the same as those that must be specified when creating the retention code, as described in *POST: Create Retention Code* on page 209. You must also specify an ID value to identify the retention code being updated.

### Response Schema Fields

The schema fields returned for the retention code are the same as those required in the request schema when creating it (or when updating it using this endpoint). They represent the configuration of the retention code. For descriptions of these fields, refer to *POST: Create Retention Code* on page 209.

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## POST: Get Retention Code (getRetentionCode)

Retrieve the configuration of a retention code.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of IDs to specify the retention codes whose configurations are to be retrieved. If you specify an ID for which there is no retention code created, it will skip that ID. If all the specified IDs are invalid, an error will be generated. If you do not provide any input, then the configurations of all the retention codes will be retrieved and displayed in a list format.<br><br>You can use the POST: Get Retention Code endpoint to retrieve retention code ID values. For more information, refer to *POST: Get Retention Code* on page 212. |

### Response Schema Fields

This endpoint returns an entry for each retention code specified in the input. Each entry includes a series of fields that represent the configuration of the retention code. For descriptions of these fields, refer to *POST: Create Retention Code* on page 209.

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## DELETE: Delete Retention Code (deleteRetentionCode)

Delete a retention code.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **retentionCodeId** | Integer | The ID of the retention code to be deleted. You can use the POST: Get Retention Code endpoint to retrieve retention code ID values. For more information, refer to *POST: Get Retention Code* on page 212. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns a string indicating whether the retention code was successfully deleted.

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## POST: Create Lexicon (createLexicon)

Create a lexicon.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **lexId** | Integer | This field is not required when creating a lexicon.. |
| **lexName** | String | Enter the name of the lexicon. |
| **lexDescription** | String | Enter a description of the lexicon. |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema, as well as the ID that has been assigned to the retention code. These fields define the retention code's configuration.

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## POST: Get Lexicons (getLexicons)

Retrieve the configuration of a lexicon.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of IDs to specify the lexicons whose configurations are to be retrieved. If you specify an ID for which there is no lexicon created, it will skip that ID. If all the specified IDs are invalid, an error will be generated. If you do not provide any input, then the configurations of all the lexicons will be retrieved and displayed in a list format. |

### Response Schema Fields

This endpoint returns an entry for each lexicon specified in the input. Each entry includes a series of fields that represent the configuration of the lexicon. This includes the following.

| Schema Field | Type | Description |
|---|---|---|
| **lexId** | Integer | The ID assigned to the lexicon. |
| **lexName** | String | The name of the lexicon. |
| **lexDescription** | String | A description of the lexicon. |

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## DELETE: Delete Lexicon (deleteLexicon)

Delete a lexicon.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **lexId** | Integer | The ID of the lexicon to be deleted. You can use the POST: Get Lexicons endpoint to retrieve lexicon ID values. For more information, refer to the previous section, *POST: Get Lexicons (getLexicons)*. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns a string indicating whether the lexicon was successfully deleted.

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## POST: Create Content Rule (createContentRule)

Create a content rule.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **ruleId** | Integer | The ID assigned to the content rule being updated. This is not required when creating a content rule. It is only required when updating a content rule with the PUT endpoint.<br>You can retrieve content rule configurations and ID values with the POST: Get Content Rules endpoint. For more information, refer to *POST: Get Content Rules* on page 223. |
| **lexiconName** | String | Enter the name of the lexicon the content rule belongs to. You can retrieve lexicon names with the *POST: Get Lexicons (getLexicons)* endpoint. For more information, refer to *POST: Get Lexicons (getLexicons)* on page 215. |
| **ruleName** | String | The name of the content rule. |
| **ruleType** | String | Specify the rule type:<br>• **Phrase:** A rule that will be applied to files that include a specific phrase or its synonyms.<br>• **Pattern:** A rule that will be applied to files that include a specific text pattern.<br>• **Disclaimer:** A rule in which otherwise objectionable words or phrases are ignored when they occur within the file. When you create a rule with this rule type and add a phrase containing an otherwise objectionable phrase, the otherwise objectionable words in it are ignored. |
| **ruleLang** | String | Specify the language for the content rule. |

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| Schema Field | Type | Description |
|---|---|---|
| **rulePhrase** | String | **Applicable to all Rule Types**.<br><br>Enter the phrase, pattern or disclaimer that is to be associated with the rule. The EFM module will flag these phrase(s) when determining which content rules are applicable to each file.<br><br>If you selected **Pattern** as the **Rule Type**, specify the desired pattern using the following syntax:<br><br># - Any Digit<br>? - Wild Card (Any digit or a letter)<br>$ - Any Letter<br>[a - z , A - Z] - Range of letters<br>[0 - 9] - Range of digits<br>[- , _ , . , \,] - Range of punctuation<br><br>For example, you could enter ###-##-#### or ######### to search for social security numbers, or $###$$#### to search for an identifier such as a license number that uses A123BC1234 format.<br><br>If you selected **Phrase** or **Disclaimer** as the **Rule Type**, specify the phrase or disclaimer to search for. |

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| | | |
|---|---|---|
| **ruleInclusionPhrase**<br>**ruleInclusionContext** | String | (Optional) If the **Rule Type** is set to **Phrase** or **Disclaimer**, use these fields to specify phrases that a file must include to trigger the content rule.<br><br>For the **Inclusion Phrase**, type the inclusion word which must appear within the defined vicinity of the main word (i.e., the phrase or disclaimer specified for the rule) for the content rule to be triggered.<br><br>For the **Inclusion Context**, choose the context in which the inclusion word must appear near the main word for the content rule to be triggered:<br><br>a. **Sentence:** The main and inclusion words must appear in the same sentence for the rule to be triggered.<br><br>b. **Paragraph:** The main and inclusion words must appear in the same paragraph for the rule to be triggered.<br><br>c. **3 words before**: The inclusion word must appear within 3 words or less to the left of the main word for the rule to be triggered. For example, in the string “how now brown cow,” “how” is 3 words to the left of “cow,” “now” is 2 words to the left of “cow,” and so on.<br><br>d. **5 words before**: The inclusion word must appear within 5 words or less to the left of the main word.<br><br>e. **3 words ahead:** The inclusion word must appear within 3 words or less to the right of the main word.<br><br>f. **3 before 5 ahead:** The inclusion word must appear within 3 words or less to the left of the main word OR within 5 words or less to the right of the main word.<br><br>g. **5 words ahead**: The inclusion word must appear within 5 words or less to the right of the main word.<br><br>h. **6 words window**: The inclusion word must appear within 3 words or less to the left of the main word OR within 3 words or less to the right of the main word.<br><br>i. **10 words window:** The inclusion word must appear within 5 words or less to the left of the main word OR within 5 words or less to the right of the main word.<br><br>j. **25 words ahead**: The inclusion word must appear within 25 words or less to the right of the main word.<br><br>k. **50 words window**: The inclusion word must appear within 25 words or less to the left of the main word OR within 25 words or less to the right of the main word.<br><br>In cases where both inclusion and exclusion phrases are configured for a content rule, the rule is triggered only if the inclusion phrase is present in the defined vicinity of the main phrase, and the exclusion phrase is not present in the defined vicinity of the main phrase. |

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| Schema Field | Type | Description |
|---|---|---|
| **ruleExclusionPhrase**<br>**ruleExclusionContext** | String | (Optional) If the **Rule Type** is set to **Phrase** or **Disclaimer**, use these fields to specify phrases that a file must exclude to trigger the content rule.<br><br>For the **Exclusion Phrase**, type the exclusion word which must not appear within the defined vicinity of the main word (i.e., the phrase or disclaimer specified for the rule) for the content rule to be triggered.<br><br>For the **Exclusion Content**, choose the context in which the exclusion word must not appear near the main word for the content rule to be triggered. Options include:<br><br>a. **Sentence**: When the main and exclusion words appear in the same sentence, that instance of the main word does not trigger the rule.<br><br>b. **Paragraph**: When the main and exclusion words appear in the same paragraph, that instance of the main word does not trigger the rule.<br><br>c. **3 words before**: When the exclusion word appears within 3 words or less to the left of the main word, that instance of the main word does not trigger the rule.<br><br>d. **5 words before**: When the exclusion word appears within 5 words or less to the left of the main word, that instance of the main word does not trigger the rule.<br><br>e. **3 words ahead**: When the exclusion word appears within 3 words or less to the right of the main word, that instance of the main word does not trigger the rule.<br><br>f. **3 before 5 ahead**: When the exclusion word appears within 3 words or less to the left of the main word OR within 5 words or less to the right of the main word, that instance of the main word does not trigger the rule.<br><br>g. **5 words ahead**: When the exclusion word appears within 5 words or less to the right of the main word, that instance of the main word does not trigger the rule.<br><br>h. **6 words window**: When the exclusion word appears within 3 words or less to the left of the main word OR within 3 words or less to the right of the main word, that instance of the main word does not trigger the rule.<br><br>i. **10 words window**: When the exclusion word appears within 5 words or less to the left of the main word OR within 5 words or less to the right of the main word, that instance of the main word does not trigger the rule.<br><br>j. **25 words ahead**: When the exclusion word appears within 25 words or less to the right of the main word, that instance of the main word does not trigger the rule.<br><br>k. **50 words window**: When the exclusion word appears |

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| Schema Field | Type | Description |
|---|---|---|
| | | within 25 words or less to the left of the main word OR within 25 words or less to the right of the main word, that instance of the main word does not trigger the rule.<br>In cases where both inclusion and exclusion phrases are configured for a content rule, the rule is triggered only if the inclusion phrase is present in the defined vicinity of the main phrase, and the exclusion phrase is not present in the defined vicinity of the main phrase. |
| **ruleSynonym** | String | (Optional) If the **Rule Type** is set to **Phrase**, type any synonyms for the main phrase as a comma-separated list. |
| **staticTagName** | String | Applicable to all **Rule Types.**<br>Enter the name of the Static Tag that will be applied to files that match this content rule. You can retrieve Static Tag names and other configuration data with the POST: Get Static Tags endpoint described on page 202. |
| **ruleActive** | Boolean | Set to True to activate the content rule. If you do not set this to True, the content rule will not be used. |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema, as well as the ID that has been assigned to the content rule. These fields define the content rule's configuration.

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## PUT: Update Content Rule (updateContentRule)

Update a content rule's configuration.

### Request Parameters

None.

### Request Body Schema Fields

The schema fields required to update the content rule's configuration are the same as those that must be specified when creating it, as described in *POST: Create Content Rule* on page 217. You must also specify an ID value to identify the content rule being updated.

### Response Schema Fields

The schema fields returned for the content rule are the same as those required in the request schema when creating it (or when updating it using this endpoint). They represent the configuration of the content rule. For descriptions of these fields, refer to *POST: Create Content Rule* on page 217.

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## POST: Get Content Rules (getContentRules)

Retrieve the configurations of content rules.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Items** | Integer | Enter a comma-separated list of content rule IDs to specify the content rules whose configurations are to be retrieved. If you specify an ID for which there is no content rule created, it will skip that ID. If all the specified IDs are invalid, an error will be generated. If you do not provide any input, then the configurations of all the content rules will be retrieved and displayed in a list format. |

### Response Schema Fields

The schema fields returned for each content rule are the same as those required in the request schema when creating it. They represent the configuration of the content rule. For descriptions of these fields, refer to *POST: Create Content Rule* on page 217.

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## DELETE: Delete Content Rule (deleteContentRule)

Delete a content rule.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **ruleId** | Integer | The ID of the content rule to be deleted. You can retrieve content rule configurations and ID values with the POST: Get Content Rules endpoint. For more information, refer to *POST: Get Content Rules* on page 223. |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns a string indicating whether the Content Rule was successfully deleted.

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## POST: Manually Apply Static Tag (manuallyApplyStaticTag)

Use this endpoint to manually apply Static Tags to files.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **listUnids** | String | Enter a comma-separated list of file IDs to specify the files to be modified. You can retrieve file IDs from the **InPlaceFileItem** database table. |
| **listTagIds** | Integer | Enter a comma-separated list of tag ID values identifying the Static Tags to be applied to the files. You can use the POST: Get Static Tags to retrieve tag configurations and ID values. For more information, refer to *POST: Get Static Tags* on page 202. |
| **idProj** | Integer | Specify the ID of the project containing the files to be modified. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |

### Response Schema Fields

A string indicating whether the operation was successful, as well as the task ID assigned to the operation. You can use the task ID to check the task status with the POST: Get Recategorization Task Status endpoint described on page 197.

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## POST: Remove Static Tag (removeStaticTag)

Use this endpoint to manually remove Static Tags from files.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **listUnids** | String | Enter a comma-separated list of file IDs to specify the files to be modified. You can retrieve file IDs from the **InPlaceFileItem** database table. |
| **listTagIds** | Integer | Enter a comma-separated list of tag ID values identifying the Static Tags to be removed from the files. You can use the POST: Get Static Tags to retrieve tag configurations and ID values. For more information, refer to *POST: Get Static Tags* on page 202. |
| **idProj** | Integer | Specify the ID of the project containing the files to be modified. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |

### Response Schema Fields

A string indicating whether the operation was successful, as well as the task ID assigned to the operation. You can use the task ID to check the task status with the POST: Get Recategorization Task Status endpoint described on page197.

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## DELETE: Delete Static Tag (deleteStaticTag)

Delete a Static Tag.

### Request Parameters

| Schema Field | Type | Description |
|---|---|---|
| **tagId** | Integer | The ID of the Static Tag to be deleted. You can use the POST: Get Static Tags endpoint to retrieve Static Tag configurations and ID values. For more information, refer to *POST: Get Static Tags* on page 202. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the operation was successful.

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## POST: Manually Apply Record Category (manuallyApplyRecordCategory)

Use this endpoint to manually apply a Record Category to files.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **listUnids** | String | Enter a comma-separated list of file IDs to specify the files to be modified. You can retrieve file IDs from the **InPlaceFileItem** database table. |
| **recordCategoryId** | Integer | Enter the ID of the Record Category to be applied to the files. You can use the POST: Get Record Categories endpoints to retrieve tag configurations and ID values. For more information, refer to *POST: Get Record Categories* on page 208. |
| **idProj** | Integer | Specify the ID of the project containing the files to be modified. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |

### Response Schema Fields

A string indicating whether the operation was successful, as well as the task ID assigned to the operation. You can use the task ID to check the task status with the POST: Get Recategorization Task Status endpoint described on page197.

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# FAM/Roles

In the FAM module, a role is an application-level set of permissions that determines what users can access and what actions users can perform in the application. The following sections describe the FAM/Roles endpoints available in the REST API. Use these endpoints to grant and revoke roles for use within the FAM module:The following sections describe the FAM/Roles endpoints available in the REST API. Use these endpoints to grant and revoke roles for use within the FAM module:

- *PUT: Grant User Roles (grantroles)*: Grant roles to a user.
- *PUT: Revoke User Roles (revokeroles):* Revoke roles from a user.

## PUT: Grant User Roles (grantroles)

Grant roles to a user.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to grant roles to. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **userRoles:** The remaining input is an array of fields defining the roles to be granted. Specify the following for each **userRole** entry: | | |
| **roleId** | Integer | The role ID. For information on obtaining role IDs, refer to the following sections:<br>• *GET: Get All Custom Roles* on page 384<br>• *GET: Get All System Roles* on page 386 |
| **scope** | String | Specify whether the role should be granted globally so that it is applicable to all dfepartments, or if it should be granted to specific departments only:<br>• **Global**: Global<br>• **InclRecur**: On selected departments recursively<br>• **Incl**: On selected departments only |

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| Schema Field | Type | Description |
|---|---|---|
| **allScopeDomainIds** | Integer | An array of domain IDs to specify the departments the role is applicable to for roles that are only granted on selected departments. These can be retrieved from the ArchiveServer Department Table.<br>Specify the domain IDs as a comma-separated list. For example:<br>`"AllScopeDomainIds": [ 0,1,2,3 ]` |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **additionalProp:** Includes the following fields for each role specified in the request. | | |
| **success** | Boolean | Indicates whether the role was granted successfully (True) or not (False). |
| **result** | String | The result of the request. The string will indicate how the role has been applied (on which departments, scope, role ID, etc). |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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## PUT: Revoke User Roles (revokeroles)

Revoke roles that have been previously assigned to a user.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to modify. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **roles** | Integer | An array of role IDs to specify the roles to be revoked. Specify the role IDs as a comma-separated list. For example:<br>`"Roles": [ 0,1,2,3 ]`<br>For information on obtaining role IDs, refer to the following sections:<br>• *GET: Get All Custom Roles* on page 384<br>• *GET: Get All System Roles* on page 386 |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **additionalProp:** Includes the following fields for each role specified in the request. | | |
| **success** | Boolean | Indicates whether the role was revoked successfully (True) or not (False). |
| **result** | String | The result of the request. If successful, a message will display indicating that the role has been revoked. |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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# UAA/Data Sources

To archive any type of data, a reference pointing to its server must be created in the ZL Unified Archival Admin (UAA) application, regardless of the server type (mail, file, SharePoint, etc). This reference - referred to as a ZL UA application server or a content server - integrates ZL UA with the physical server on the corporate network.

The following sections describe the UAA/DataSources endpoints available in the REST API. Use these endpoints to create and update servers in ZL UA:

- *POST: Create Box Server (createBoxServer)*
- *POST: Create An EWS Mail Server (createmailserver/ews)*
- *POST: Create File Server (createFileServer)*
- *POST: Create a Google Drive Server (creategoogledriveserver)*
- *POST: Create a Google Mail Server (creategooglemailserver)*
- *POST: Create a Lotus Domino Mail Server (createlotusdominomailserver)*
- *POST: Create an Exchange Mail Server (createmailserver/microsoftexchange)*
- *POST: Create a OneDrive Server (createonedriveserver)*
- *POST: Create a SharePoint Server (createsharepointserver)*
- *DELETE: Delete Server (deletemailserver)*
- *GET: Get All Servers (getallmailservers)*
- *GET: Get Server Using ID (getmailserverusingid)*
- *GET: Get Server Using Name (getmailserverusingname)*
- *PUT: Update Box Server (updateBoxServer)*
- *PUT: Update an EWS Mail Server (updateewsmailserver)*
- *PUT: Update File Server (updatefileserver)*
- *PUT: Update a Google Drive Server (updategoogledriveserver)*
- *PUT: Update a Google Mail Server (updategooglemailserver)*
- *PUT: Update a Lotus Domino Mail Server (updatelotusdominoserver)*
- *PUT: Update an Exchange Mail Server (updatemailserver/exchange)*
- *PUT: Update a OneDrive Server's Configuration (updateonedriveserver)*
- *PUT: Update a SharePoint Server (updatesharepointserver)*

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## POST: Create Box Server (createBoxServer)

Create a Box server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Enter the name of the Box server. |
| **credential** | String | Enter the name of the Credentials object required to access the Box server. This must be created with the UAA module. The **CloudCredentials** database table includes the Credential object names within your installation.<br>For instructions on creating Credentials objects, refer to the *ZL UA Box Archiving Administrator's Guide*. |

### Response Schema Fields

The schema fields returned for the server are the same as those specified in the request schema, as well as the following additional fields. These fields define the server's configuration.

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The ID assigned to the Box server. |
| **name** | String | The name assigned to the Box server. |
| **serverType**<br>**serverSubType** | String | The server type and sub-type. |
| **url** | String | The server URL |
| **param** | String | Additional information about the server, including the name of the Credentials object assigned to it. |
| **discoveryName** | String | The server discovery name. |
| **group** | String | The server group. |
| **dateCreate** | String | A timestamp indicating when the server was created or last updated. |

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## POST: Create An EWS Mail Server (createmailserver/ews)

Create a Microsoft Exchange Web Services (EWS) mail server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Specify the server name. |
| **serverURL** | String | Specify the URL of the Microsoft EWS server. |
| **discoveryMethod** | String | Enter the name of the Discovery object to use with the server. This must be created with the UAA module. For detailed instructions on this and other aspects of MS Teams server administration, refer to the *ZL UA MS Teams Administrator's Guide*. |
| **exchangeServiceUrl** | String | Use the following URL:<br>https://outlook.office365.com/EWS/Exchange.asmx<br>This is the service URL for O365 presently being used by Microsoft. ZL UA will use this URL to look up mailbox information for users and teams. |
| **userDefaultCredential** | Boolean | Set to True to use the default credentials for the EWS server. |
| **ewsServerVersion** | String | Specify the EWS server version by entering any of the following values:<br>2010<br>2013<br>2016<br>2019<br>O365 |
| **ewsCredential** | String | Enter the name of the Credentials object required to access the server. This must be created with the UAA module. The **CloudCredentials** database table includes the Credential object names within your installation.<br>For detailed instructions on Credentials objects and other aspects of MS Teams server administration, refer to the *ZL UA MS Teams Administrator's Guide*. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **server Type** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server, including the server version, Exchange server URL, impersonation mode setting and auto-discovery setting. |
| **discovery Name** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## POST: Create File Server (createFileServer)

Create a file server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Specify the server name. |
| **ip** | String | Specify the server IP address. |
| **port** | String | Type the port number used by the ZL File Connector. The default value is 9975. Leave the default value unless you are changing this port in the ZL File Connector as well. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | The server port. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## POST: Create a Google Drive Server (creategoogledriveserver)

Create a Google Drive server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | This field is not required when creating a Google Drive server. |
| **serverName** | String | Enter the display name for the Google Drive server. |
| **serverURL** | String | Enter the URL of the Google Drive server. |
| **adminUserToImpersonate** | String | Enter the email address used to create the Google Drive service account for this server. This can be left blank if the service account has been directly added to shared drives. In this case, the service account created has to be present as a user in every shared drive that has to be crawled. |
| **consumerCertFile** | String | Specify the path and file name of the JSON key file downloaded when creating the Google Drive service account for this server. The file path entered must be relative to the server you are creating.<br>For example, consider a ZL UA installation where there are 3 servers: Server1, Server2 and Server3. If the key file is on the D: drive of Server2 and you are creating the entry for Server2, you can enter the following file path:<br>`D:\\file.txt`<br>However, if you are creating the entry for one of the other servers, you need to enter the server name as part of the file path:<br>`\\server2\D$\file.txt` |
| **scopes** | String | Specify the service account scopes. Use this to set the change level of Google Drive API permissions that can be assigned to ZL. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Information about the server connector. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## POST: Create a Google Mail Server (creategooglemailserver)

Create a Google Mail server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Enter the display name for the Google Mail server. |
| **serverURL** | String | Enter the URL of the Google Mail server. |
| **serverHost** | String | Enter the hostname or IP address of the Google Mail server. |
| **domainName** | String | Enter the server domain name. |
| **adminUserId** | String | Specify the administrator user ID for the Google Mail server. |
| **adminPassword** | String | Specify the administrator password for the Google Mail server. |
| **consumerKey** | String | Specify the consumer key generated for the Google Mail server. |
| **consumerSecret** | String | Specify the secret key generated for the Google Mail server. |
| **serviceAccountId** | String | Enter the ID for the Google Mail service account created to administer this server. |
| **certificateFile** | String | Specify the path and file name of the certificate file for the Google Mail server. The file path entered must be relative to the server you are creating.<br>For example, consider a ZL UA installation where there are 3 servers: Server1, Server2 and Server3. If the key file is on the D: drive of Server2 and you are creating the entry for Server2, you can enter the following file path:<br>`D:\file.txt`<br>However, if you are creating the entry for one of the other servers, you need to enter the server name as part of the file path:<br>`\\server2\D$\file.txt` |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server connector. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## POST: Create a Lotus Domino Mail Server (createlotusdominomailserver)

Create a Lotus Domino mail server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Enter the display name for the Lotus Domino server. |
| **serverURL** | String | Type the loop back address (127.0.0.1) or IP address of the machine that is running the ZL Domino TCP Connector. |
| **parentServer** | String | Enter the parent server URL. If specified, the connector URL, Notes password, and remote temp directory will be taken from the parent server. Alternately, enter **None** for the Parent Server field and specify these parameters below. |
| **notesAdminPassword** | String | Type the password of the administrative service account you created in Notes. |
| **remoteRouterHost** | String | Type the name of the remote router if there is no local router. |
| **discoveryMethod** | String | Enter the name of the Discovery object to use with the server. This must be created with the UAA module. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server, such as the parent server name, admin password, remote temporary directory and remote router host. |

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| Schema Field | Type | Description |
|---|---|---|
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## POST: Create an Exchange Mail Server (createmailserver/microsoftexchange)

Create a Microsoft Exchange mail server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Specify the server name. |
| **transportHost** | String | Enter the hostname or URL of the machine running the ZL MAPI Connector for this server. |
| **discoveryMethod** | String | Enter the name of the Discovery object to use with the server. This must be created with the UAA module. |
| **serverCn** | String | Enter the server's common name. |
| **casServer** | String | Type the Client Access Server name. For O365, this should be set to match the SMTP address of the transport account for the server. |
| **exchangeServerVersion** | String | Specify the Exchange server version by entering any of the following values:<br>2010<br>2013<br>2016<br>2019<br>O365 |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **server Type** | String | The server type. |
| **serverSubType** | String | The server subtype |

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| Schema Field | Type | Description |
|---|---|---|
| **url** | String | The server URL. |
| **param** | String | Additional information about the server, including the server CN value, CAS server name and server version. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreated** | String | The date the server was created. |

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## POST: Create a OneDrive Server (createonedriveserver)

Create a OneDrive server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Specify the server name. |
| **credential** | String | Enter the name of the Credentials object created for the server in UAA. The **CloudCredentials** database table includes the Credential object names within your installation.<br>For more information on creating Credentials objects, refer to the *ZL UA OneDrive Archiving Administrator's Guide*. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## POST: Create a SharePoint Server (createsharepointserver)

Create a SharePoint server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | This field is not required.. |
| **serverName** | String | Specify the server name. |
| **serverUrl** | String | Enter the IP address or host name of the host server on which you have installed the SharePoint connector. |
| **sharePointFarmDbInstance** | String | This information must be obtained from the SharePoint server's SQL DB. Go to the SharePoint DB server, and select the database for SharePoint. Copy the name of this database and paste it into this text box. |
| **credentials** | String | Enter the name of the Credentials object created for the server in UAA. The **CloudCredentials** database table includes the Credential object names within your installation.<br>For more information on creating Credentials objects, refer to the *ZL UA SharePoint Archiving Administrator's Guide*. |
| **appOnly** | Boolean | Set to True to use app-only authentication (a.k.a. application permissions) for this server. Set to True if you are using the SharePoint Online connector. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **server Type** | String | The server type. |
| **serverSubType** | String | The server subtype |

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| Schema Field | Type | Description |
|---|---|---|
| **url** | String | The server URL. |
| **param** | String | Additional information about the server SharePoint farm database instance. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |
| **appOnly** | Boolean | Set to True when app-only authentication (a.k.a. application permissions) is enabled for the server. |

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## DELETE: Delete Server (deletemailserver)

Delete a server.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **serverId** | Integer | Specify the ID of the server to be deleted. You can obtain server IDs with the Get: Get All Mail Severs endpoint, as described in *GET: Get All Servers* on page 249. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the server was deleted successfully.

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## GET: Get All Servers (getallmailservers)

Retrieve a list of all file and mail servers that have been added to ZL UA.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Server Entries:** The response includes an entry for each server found. The schema fields included in each entry are described below. | | |
| **id** | Integer | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server sub-type. |
| **url** | String | The server URL, if applicable. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery object assigned to the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## GET: Get Server Using ID (getmailserverusingid)

Retrieve a server configuration. Specify the server by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **serverId** | Integer | Specify the ID of the server to be retrieved. You can obtain server IDs with the GET: Get Severs endpoint, as described on page 249. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server sub-type. |
| **url** | String | The server URL, if applicable. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery object assigned to the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## GET: Get Server Using Name (getmailserverusingname)

Retrieve a server configuration. Specify the server by its name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **serverName** | String | Specify the name of the server to be retrieved. You can obtain server names with the GET: Get All Severs endpoint, as described on page 249. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server sub-type. |
| **url** | String | The server URL, if applicable. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery object assigned to the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## PUT: Update Box Server (updateBoxServer)

Update a Box server's configuration.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Enter the name of the Box server. You can obtain server names with the GET: Get All Severs endpoint, as described on page 249. |
| **credential** | String | Enter the name of the Credentials object required to access the Box server. This must be created with the UAA module. The **CloudCredentials** database table includes the Credential object names within your installation.<br>For instructions on creating Credentials objects, refer to the *ZL UA Box Archiving Administrator's Guide.* |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **server Type** | String | The server type. |
| **serverSubType** | String | The server subtype. |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## PUT: Update an EWS Mail Server (updateewsmailserver)

Update the configuration of a Microsoft EWS mail server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the ID of the Microsoft EWS server to be updated. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **serverUrl** | String | Specify the URL of the Microsoft EWS server. |
| **exchangeServiceUrl** | String | Use the following URL:<br>https://outlook.office365.com/EWS/Exchange.asmx<br>This is the service URL for O365 presently being used by Microsoft. ZL UA will use this URL to look up mailbox information for users and teams. |
| **enableAutoDiscovery** | Boolean | The appropriate setting for auto-discovery is detected and configured while creating the server. Set to True to enable it or False to disable it. |
| **discoveryMethod** | String | Enter the name of the Discovery object to use with the server. This must be created with the UAA module. |
| **ewsCredential** | String | Enter the name of the Credentials object required to access the server. This must be created with the UAA module. The **CloudCredentials** database table includes the Credential object names within your installation.<br>For detailed instructions on this and other aspects of MS Teams server administration, refer to the *ZL UA MS Teams Administrator's Guide*. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |

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| Schema Field | Type | Description |
|---|---|---|
| **server Type** | String | The server type. |
| **serverSubtype** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## PUT: Update File Server (updatefileserver)

Update a file server's configuration.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **serverId** | Integer | Specify the ID of the file server to be updated. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Specify the file server name. You can obtain server names with the GET: Get All Severs endpoint, as described on page 249. |
| **ip** | String | Specify the server server IP address. |
| **port** | String | Specify the port number used by the ZL File Connector. The default value is 9975. Leave the default value unless you are changing this port in the ZL File Connector as well. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | The server port. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## PUT: Update a Google Drive Server (updategoogledriveserver)

Update a Google Drive server's configuration.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the ID of the Google Drive server to be updated. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **serverName** | String | Enter the display name for the Google Drive server. |
| **serverURL** | String | Enter the URL of the Google Drive server. |
| **adminUserToImpersonate** | String | Enter the email address used to create the Google Drive service account for this server. This can be left blank if the service account has been directly added to shared drives. In this case, the service account created has to be present as a user in every shared drive that has to be crawled. |
| **consumerCertFile** | String | Specify the path and file name of the JSON key file downloaded when creating the Google Drive service account for this server. The file path entered must be relative to the server you are creating.<br>For example, consider a ZL UA installation where there are 3 servers: Server1, Server2 and Server3. If the key file is on the D: drive of Server2 and you are creating the entry for Server2, you can enter the following file path:<br>`D:\file.txt`<br>However, if you are creating the entry for one of the other servers, you need to enter the server name as part of the file path:<br>`\\server2\D$\file.txt` |
| **scopes** | String | Specify the service account scopes. Use these to set the change level of Google Drive API permission that can be assigned to ZL. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## PUT: Update a Google Mail Server (updategooglemailserver)

Update a Google Mail server's configuration.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the ID of the Google Mail server to be updated. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **serverHost** | String | Enter the hostname or IP address of the Google Mail server. |
| **domainName** | String | Enter the server domain name. |
| **adminUserId** | String | Specify the administrator user ID for the Google Mail server. |
| **adminPassword** | String | Specify the administrator password for the Google Mail server. |
| **consumerKey** | String | Specify the consumer key generated for the Google Mail server. |
| **consumerSecret** | String | Specify the secret key generated for the Google Mail server. |
| **serviceAccountId** | String | Enter the ID for the Google Mail service account created to administer this server. |
| **certificateFile** | String | Specify the path and file name of the certificate file for the Google Mail server. The file path entered must be relative to the server you are creating.<br>For example, consider a ZL UA installation where there are 3 servers: Server1, Server2 and Server3. If the key file is on the D: drive of Server2 and you are creating the entry for Server2, you can enter the following file path:<br>`D:\file.txt`<br>However, if you are creating the entry for one of the other servers, you need to enter the server name as part of the file path:<br>`\\server2\D$\file.txt` |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## PUT: Update a Lotus Domino Mail Server (updatelotusdominoserver)

Update a Lotus Domino mail server's configuration.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the ID of the server to be updated. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **parentServer** | String | Enter the parent server URL. If specified, the connector URL, Notes password, and remote temp directory will be taken from the parent server. Alternately, enter **None** for the Parent Server field and specify these parameters below. |
| **serverURL** | String | Type the loop back address (127.0.0.1) or IP address of the machine that is running the ZL Domino TCP Connector. |
| **notesAdminPassword** | String | Type the password of the administrative service account you created in Notes. |
| **remoteRouterHost** | String | Type the name of the remote router if there is no local router. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **serverType** | String | The server type. |
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |

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| Schema Field | Type | Description |
|---|---|---|
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## PUT: Update an Exchange Mail Server (updatemailserver/exchange)

Update a Microsoft Exchange mail server's configuration.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **serverId** | Integer | Specify the ID of the Microsoft Exchange mail server to be updated. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverCn** | String | Enter the server's common name. |
| **casServerName** | String | Type the Client Access Server name. For O365, this should be set to match the SMTP address of the transport account for the server. |
| **mapiClientHost** | String | Enter the hostname or URL of the machine running the ZL MAPI Connector for this server. |
| **exchangeServerVersion** | String | Specify the Exchange server version by entering any of the following values:<br>2010<br>2013<br>2016<br>2019<br>O365 |
| **discoveryMethod** | String | Enter the name of the Discovery object to use with the server. This must be created with the UAA module. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **server Type** | String | The server type. |

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| Schema Field | Type | Description |
|---|---|---|
| **serverSubType** | String | The server subtype |
| **url** | String | The server URL. |
| **param** | String | Addtiional information about the server. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## PUT: Update a OneDrive Server's Configuration (updateonedriveserver)

Update a OneDrive server's configuration.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **serverName** | String | Specify the server name. You can obtain server names with the GET: Get All Severs endpoint, as described on page 249. |
| **credential** | String | Enter the name of the Credentials object created for the server in UAA. The **CloudCredentials** database table includes the Credential object names within your installation.<br>For more information on creating Credentials objects, refer to the *ZL UA OneDrive Archiving Administrator's Guide*. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | String | The server ID. |
| **name** | String | The server name. |
| **server Type** | String | The server type. |
| **serverSubType** | String | The server subtype. |
| **url** | String | The server URL. |
| **param** | String | Additional information about the server. |
| **discoveryName** | String | The name of the Discovery Settings object on the server. |
| **group** | String | The server group. |
| **dateCreate** | String | The date the server was created. |

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## PUT: Update a SharePoint Server (updatesharepointserver)

Update a SharePoint server's configuration.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the ID of the SharePoint server to be updated. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **serverName** | String | Specify the server name. |
| **serverUrl** | String | Enter the IP address or host name of the host server on which you have installed the SharePoint connector. |
| **sharePointFarmDbInstance** | String | This information must be obtained from the SharePoint server's SQL DB. Go to the SharePoint DB server, and select the database for SharePoint. Copy the name of this database and paste it into this text box. |
| **credentials** | String | Enter the name of the Credentials object created for the server in UAA. The **CloudCredentials** database table includes the Credential object names within your installation.<br>For more information on creating Credentials objects, refer to the *ZL UA SharePoint Archiving Administrator's Guide*. |
| **appOnly** | Boolean | Set to True when using app-only authentication (a.k.a. application permissions) for this server. This should be set to True when you are using the SharePoint Online connector. |

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# FAM/Dashboards

When using the FAM module, it is important to understand the difference between a project and a dashboard:

- A project is a set of folders and files that has been grouped together. Projects are also used in other ZL UA modules.
- A dashboard is a set of projects that has been grouped together for analysis within the FAM module.

The following sections describe the FAM/Dashboards endpoints available in the REST API. Use these endpoints to create and update dashboards:

- *POST: Create Dashboard (createdashboard*): Create a dashboard.
- *DELETE: Delete Dashboard (deletedashboard)*: Delete a dashboard.
- *POST: Download Dashboard Report (downloaddashboardreport*): Download the Dashboard Report, an Excel spreadsheet summarizing the contents of the dashboard.
- *GET: Get All Dashboards (getalldashboards)*: Retrieve the configuration of all dashboards.
- *GET: Get All Dashboards of a User (getalldashboards)*: Retrieve the configuration of all dashboards associated with a specific user.
- *GET: Get All Dashboards of a User Based on Status (getalldashboards)*: Retrieve the configuration of all dashboard assigned a specific status.
- *GET: Get Dashboard Using ID (getdashboardusingid)*: Retrieve the configuration of a dashboard specified by its ID,
- *GET: Get Default Dashboard (getdefaultdashboard)*: Retrieve the configuration of the default dashboard assigned to a particular user.
- *PUT: Update Dashboard (updatedashboard)*: Update the configuration of a dashboard.

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## POST: Create Dashboard (createdashboard)

Create a dashboard.

### Request Parameters

None.

### Request Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **Id** | Integer | Specify the dashboard ID. |
| **zlpUserId** | Integer | Specify the ZLP user ID of the user that the dashboard will be available to. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **isDefault** | Boolean | Set to True if this dashboard should be used as the default dashboard that is displayed when the FAM module opens for the assigned user. |
| **name** | String | Specify the name of the dashboard. |
| **projectIds** | Integer | An array of project IDs to specify the projects that should be added to the dashboard. Specify the project IDs as a comma-separated list. For example:<br>`"projectIds": [ 0,1,2,3 ]`<br>You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **mapParam** | String | Not required. |

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **Id** | Integer | The dashboard ID. |
| **zlpUserId** | Ineger | The ZLP user ID of the user the dashboard is assigned to. |
| **isDefault** | Boolean | If True, then this dashboard will be used as the default dashboard that is displayed when the assigned user logs into the FAM module. |

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| Parameter | Type | Description |
|---|---|---|
| **name** | String | The name of the dashboard. |
| **projectIds** | Integer | An array of project IDs to specify the projects that are included in the dashboard. The project IDs will appear as a comma-separated list. For example:<br>`"projectIds": [ 0,1,2,3 ]` |
| **mapParam** | String | A key including the IDs of the projects included in the dashboard. |

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## DELETE: Delete Dashboard (deletedashboard)

Delete a dashboard.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **dashId** | Integer | Specify the ID of the dashboard to be deleted. You can retrieve dashboard IDs with the GET: Get All Dashboards endpoint, as described in *GET: Get All Dashboards (getalldashboards)* on page 271. |

### Request Schema Fields

None.

### Response Schema Fields

A string indicating whether the dashboard was deleted successfully.

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## POST: Download Dashboard Report (downloaddashboardreport)

Download the Dashboard Report: an Excel spreadsheet summarizing the contents of the dashboard. The report will be downloaded to the **Downloads** directory. It includes several tabs you can use to view different types of data:

- **Dashboard Summary**: The header indicates how many projects the dashboard includes, the total size of these projects, and the total file and folder count. The Dashboard Summary also includes basic details about each project included in the dashboard, such as the project ID, the project name, the project type, and the number of files included in the project.
- **Project Distribution**: Indicates the total size and file count of each project included in the dashboard.
- **File Extension Distribution**: Indicates how many files of each extension type (e.g. BIN or SETUP) are included in each project.
- **Size Category Distribution**: Indicates how many files of different size categories are included in each project. For example, it lists how many small-sized (10KB-100KB) files there are in the data set, how many medium-sized files (100KB-1MB) there are, and so on.
- **Tag Distribution**: Indicates how many files each tag has been applied to.
- **ACL Distribution**: List each user that is an ACL owner for files within the currently selected dashboard, and indicates how many files the user is ACL owner for.
- **Create Date**: Lists the number of files created and the size of those files for each date on which a file within the currently selected dashboard was created.
- **Last Modified Date**: Lists the number of files modified and the size of those files for each date on which a file within the currently selected dashboard was modified.
- **Last Accessed Date**: Lists the number of files accessed and the size of those files for each date on which a file within the currently selected dashboard was accessed.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **dashId** | Integer | Specify the ID of the dashboard you want to view in the report. You can retrieve dashboard IDs with the GET: Get All Dashboards endpoint, as described in *GET: Get All Dashboards (getalldashboards)* on page 271. |

### Request Schema Fields

None.

### Response Schema Fields

A string indicating whether the report was generated successfully.

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## GET: Get All Dashboards (getalldashboards)

Retrieve a list of the dashboards that have been created.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Dashboards:** Includes an entry for each dashboard that is found. The fields included for each dashboard are the same as those required in the request schema when creating the dashboard. They represent the basic configuration of the dashboard. For descriptions of these fields, refer to *POST: Create Dashboard* on page 267. | | |

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## GET: Get All Dashboards of a User (getalldashboards)

Retrieve a list of the dashboards that were created by a specific user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZLP user ID of the user whose dashboards you want to view. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Dashboards:** Includes an entry for each dashboard that was created by the specified user. The fields included for each dashboard are the same as those required in the request schema when creating the dashboard. They represent the configuration of the dashboard. For descriptions of these fields, refer to *POST: Create Dashboard* on page 267. | | |

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## GET: Get All Dashboards of a User Based on Status (getalldashboards)

Retrieve a list of the dashboards that are available to a specific user that have a specific status.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZLP user ID of the user whose dashboards you want to view. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **status** | Integer | 0: No Status<br>1: Default Status |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Dashboards:** Includes an entry for each dashboard that is found for the user. The fields included for each dashboard are the same as those required in the request schema when creating the dashboard. They represent the configuration of the dashboard. For descriptions of these fields, refer to *POST: Create Dashboard* on page 267. | | |

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## GET: Get Dashboard Using ID (getdashboardusingid)

Retrieve the configuration of a specific dashboard by specifying its dashboard ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **dashboardId** | Integer | Specify the ID of the dashboard you want to view. You can retrieve dashboard IDs with the GET: Get All Dashboards endpoint, as described in *GET: Get All Dashboards (getalldashboards)* on page 271. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Dashboards:** The fields included for the dashboard are the same as those required in the request schema when creating the dashboard. They represent the configuration of the dashboard. For descriptions of these fields, refer to *POST: Create Dashboard* on page 267. | | |

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## GET: Get Default Dashboard (getdefaultdashboard)

Retrieve the configuration of the default dashboard that is assigned to a particular user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ID of the user whose default dashboard you want to view. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Dashboards:** The fields included for the default dashboard are the same as those required in the request schema when creating the dashboard. They represent the configuration of the default dashboard. For descriptions of these fields, refer to *POST: Create Dashboard* on page 267. | | |

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## PUT: Update Dashboard (updatedashboard)

Update the configuration of an existing dashboard.

### Request Parameters

None.

### Request Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **Id** | Integer | Specify the dashboard ID. |
| **zlpUserId** | Ineger | Specify the ZLP user ID the dashboard should be assigned to. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **isDefault** | Boolean | Set to True if this dashboard should be used as the default dashboard that is displayed when the assigned user opens the FAM module. |
| **name** | String | Specify the name of the dashboard. |
| **projectIds** | Integer | An array of project IDs to specify the projects that should be added to the dashboard. Specify the project IDs as a comma-separated list. For example:<br>`"projectIds": [ 0,1,2,3 ]`<br>You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **mapParam** | String | Not required. |

### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **ID** | Integer | The dashboard ID. |
| **zlpUserId** | Ineger | The ZLP user ID of the user the dashboard is assigned to. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **isDefault** | Boolean | If True, then this dashboard will be used as the default dashboard that is displayed when the assigned user opens the FAM module. |

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| Parameter | Type | Description |
|---|---|---|
| **name** | String | The name of the dashboard. |
| **projectIds** | Integer | An array of project IDs to specify the projects that are included in the dashboard. The project IDs will appear as a comma-separated list. For example:<br>`"projectIds": [ 0,1,2,3 ]` |
| **mapParam** | String | Additional information about the dashboard presented as a key value. The project IDs of the projects included in the dashboard will be included and separated by underscores. For example, a dashboard that includes projects with IDs 23 and 25 would be presented as:<br>“DashKey”: “23_25” |

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# FAM/Disposition

Disposition is the process by which files whose records management lifecycle has expired are deleted and removed from the ZL UA system. The Disposition Workflow includes the following steps:

- Disposition is enabled on a project. When enabling the Disposition Workflow, the Project Administrator also schedules Disposition Runs. During each Disposition Run, the system determines which files in the project are eligible for disposition and automatically creates Disposition Approval Requests for those files.
- Disposition Approval Requests are generated for files whose records management lifecycle has expired to be removed after each Disposition Run.
- When the Disposition Approval Requests are approved, the Disposition Taks can be executed to remove the files.

For more comprehensive details on the Disposition Workflow, refer to the *ZL File Analysis and Management Administrator's Guide.* The following sections describe the FAM/Disposition endpoints available in the REST API. Use these endpoints to enable and disable disposition, and view disposition status:

- *POST: Approve Disposition (approvedisposition):* Approve a disposition run that has been executed upon a project.
- *PUT: Disable Disposition (disabledisposition)*: Enable disposition on a project.
- *PUT: Enable Disposition (enabledisposition)*: Disable disposition on a project.
- *GET: Get Latest Disposition Run (getlatestrun)*: Retrieve information for the latest Disposition Run executed upon a project.
- *GET: Get Projects Pending Approval (getprojectspendingforapproval)*: Retrieve a list of projects with pending Disposition Approval Requests.
- *GET: Get Projects Ready For Disposition (getprojectsreadyfordisposition*): Retrieve a list of projects with approved Disposition Approval Requests.
- *POST: Start Disposition (startdisposition)*: Start a Disposition Run.

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## POST: Approve Disposition (appprovedisposition)

Approve a disposition run that has been executed upon a project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project to be updated. You can obtain FAM project IDs for projects that having Disposition Runs that are pending approval with the GET: Get Projects Ready for Approval endpoint described on page 283. |
| **runId** | Integer | Specify the Disposition Run ID. You can obtain Disposition Run IDs with the Get Latest Disposition Run endpoint. For more information, refer to *GET: Get Latest Disposition Run* on page 282. |
| **approvalComment** | String | Enter any comments or descriptive information needed for the Disposition Run approval. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the disposition run was approved successfully.

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## PUT: Disable Disposition (disabledisposition)

Disable disposition for a project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project to be updated. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether disposition was disabled successfully for the project.

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## PUT: Enable Disposition (enabledisposition)

Enable disposition for a project.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **idProj** | Integer | Specify the ID of the project to be updated. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **dateStart**<br>**dateEnd** | String | Specify a date range during which Disposition Runs should be executed. A Disposition Run will be executed for the first time on the start date, and subsequent runs will be executed once a month until the end date is reached. Leave the End Date blank to run the task indefinitely.<br>During each Disposition Run, the system determines which files in the project are eligible for disposition and automatically creates a Disposition Approval Request for those files.<br>Specify the dates using the following format:<br>YYYY-MM-DD |

### Response Schema Fields

A string indicating whether disposition was enabled successfully for the project.

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## GET: Get Latest Disposition Run (getlatestrun)

Retrieve information for the latest Disposition Run for a project. The response to the call includes information such as the name of the user who approved the Disposition Run and any comments entered when approving the request.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project to be viewed. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | The project ID. |
| **runId** | Integer | The Disposition Run ID. |
| **approvalComment** | String | The comment that was entered when the Disposition Run was approved. |
| **statusMsg** | String | A message describing the current status of the Disposition Run. |
| **approverFullName** | String | The name of the user who approved the Disposition Run. |
| **approverAddress** | String | The email address of the user who approved the Disposition Run. |
| **dateStart**<br>**dateEnd** | String | The start date and end date for the Disposition Run. |
| **approved** | Boolean | Indicates whether the Disposition Run has been approved. |

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## GET: Get Projects Pending Approval (getprojectspendingforapproval)

Retrieve the project IDs of projects that have pending Disposition Approval Requests.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Project IDs:** Lists the project ID for each project with a pending Disposition Approval Request as a comma-separated list. | | |

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## GET: Get Projects Ready For Disposition (getprojectsreadyfordisposition)

Retrieve the project IDs of projects that are ready for disposition, meaning that a Disposition Run has been approved and the Disposition Task can be run next.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Project IDs:** Lists the project ID for each project that is ready for Disposition as a comma-separated list. | | |

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## POST: Start Disposition (startdisposition)

Execute a Disposition Task on a project. The Disposition Task This deletes the files included in the most recently approved Disposition Approval Request and removes them from the ZL UA system.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project to be updated. You can obtain FAM project IDs that are ready for disposition with the GET: Get Projects Ready for Disposition endpoint described in the previous section. |
| **runId** | Integer | Specify the Disposition Run ID. You can obtain Disposition Run IDs with the Get Latest Disposition Run endpoint. For more information, refer to *GET: Get Latest Disposition Run* on page 282. |

### Request Schema Fields

None.

### Response Schema Fields

A string indicating whether the Disposition Run was executed successfully.

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# FAM/Reports

The following sections describe the FAM/Reports endpoints available in the REST API. Use these endpoints to download any of the following reports:

- **Audit Trail Report**: This lists the actions taken upon the project (e.g., Project Viewed, Search Ran, etc.) and indicates which user performed each action.
- **File Analysis Report**: This lists information for a specified folder, such as the number of sub-folders and files, as well as information related to tagging and retention codes. It also includes details for each project directory path, such as the total size of the directory, the number of files it contains and the retention code that has been applied.
- **File Manifest Report**: This lists the file name, folder name and path of the files included in the data set. The file names and folder paths are presented as hyperlinks which you can click to open the file (if you have access to the server machine). Excel allows a maximum of 30,000 active hyperlinks per document, so large sets of data may not include hyperlinks for every file.
- **PII Report**: This lists the files that included terms matching the PII patterns defined for your installation. This includes the file name, folder name and path of each file that included PII terms. It also includes the specific PII terms the file included, and how many times each term was found.
- **Remediation Report**: Lists remediation actions that have been carried out within a project.
- **File Tree Disposition Report:** This lists the file name, folder name and path of the files that were disposed of during the Disposition Run, as well as other file attributes such as the name, extension and type, creation and last modification date, size, record category, and disposition eligibility date.
- **File Tree Pre-Disposition Report:** This lists the files that are eligible for disposition within the project.

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## POST: Download Audit Trail Report (downloadaudittrailreport)

Download an audit report for a project. This lists the actions taken upon the project (e.g., Project Viewed, Search Ran, etc) and indicates which user performed each action. The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **startDate**<br>**endDate** | String | The start date and end date for the report (inclusive). Audit trail data for this date range will be included in the report. |
| **actionType**<br>**subType** | String | Specify the action type and sub-type you want to view. Each action type has a group of action sub-types you can view in the audit report.<br>For example, you could set **actionType** to **search** and set **subtype** to **ACTION_SAVED_TO_EDISCOVERY** to see when search results were saved to the Discovery Manager in the audit report.<br>Refer to the following section, *Action Types and Sub-Types,* for possible combination values. |

### Action Types and Sub-Types

| Action Type | Available Sub-Types |
|---|---|
| **entry** | ACTION_ENTRY_DOWNLOADED<br>ACTION_MANUAL_TAG_APPLIED<br>ACTION_MANUAL_TAG_REMOVED<br>ACTION_MANUAL_RECORD_APPLIED |

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| Action Type | Available Sub-Types |
|---|---|
| **retentionActions** | ACTION_RETENTION_BACKGROUND_TASK<br>ACTION_RETENTION_CREATE_PURGE<br>ACTION_RETENTION_RETIRE_BIGDB<br>ACTION_RETENTION_DOWNLOAD_REPORT<br>ACTION_RETENTION_APPROVAL<br>ACTION_RETENTION_ABORT<br>ACTION_RETENTION_CREATE_DISPOSITION_RUN |
| **task** | ACTION_CRAWL_SUBMITTED<br>ACTION_UPDATE_CONTENT_INDEX_SUBMITTED<br>ACTION_RUN_METADATA_TAGGER_SUBMITTED<br>ACTION_RUN_CONTENT_TAGGER_SUBMITTED<br>ACTION_RUN_PII_TAGGER_SUBMITTED<br>ACTION_RUN_REMEDIATION_SUBMITTED<br>ACTION_UPDATE_TAG_INDEX_SUBMITTED<br>ACTION_RUN_ALL_SEARCHES |
| **privileges** | ACTION_PRIVILEGES_UPDATE |
| **search** | ACTION_SAVED_SEARCH_CREATED<br>ACTION_SEARCH_RAN<br>ACTION_SEARCH_TAGGED<br>CROSS_PROJECT_SEARCH_RAN<br>CROSS_PROJECT_SEARCH_HITS_VIEWED<br>ACTION_SAVED_TO_EDISCOVERY<br>ACTION_SAVED_SEARCH_DELETED |
| **report** | ACTION_SUMMARY_REPORT_DOWNLOADED<br>ACTION_MANIFEST_REPORT_DOWNLOADED<br>ACTION_PII_REPORT_DOWNLOADED<br>ACTION_DBFTE_REPORT_DOWNLOADED |
| **dashboard** | ACTION_DASHBOARD_CREATED<br>ACTION_DASHBOARD_UPDATED<br>ACTION_DASHBOARD_DELETED<br>ACTION_RUN_DASHBOARD_UPDATE_SUBMITTED<br>ACTION_DOWNLOAD_DASHBOARD |
| **project** | ACTION_PROJECT_CREATED<br>ACTION_PROJECT_UPDATED<br>ACTION_PROJECT_DELETED<br>ACTION_PROJECT_VIEWED |

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| Action Type | Available Sub-Types |
|---|---|
| **policy** | ACTION_SAMPLING_POLICY_CREATED<br>ACTION_SAMPLING_POLICY_UPDATED<br>ACTION_RUN_SAMPLING_SUBMITTED |
| **tagconfig** | ACTION_METADATA_SPEC_UPLOADED<br>ACTION_CONTENT_SPEC_UPLOADED<br>ACTION_PII_SPEC_UPLOADED<br>ACTION_TAG_CREATED<br>ACTION_TAG_DELETED<br>ACTION_TAGS_UPLOADED<br>ACTION_TAG_ACTION_APPLIED = 1906 |
| **audit** | ACTION_AUDIT_TRAIL_VIEWED<br>ACTION_AUDIT_TRAIL_DOWNLOADED<br>ACTION_ENTRY_AUDIT_TRAIL_VIEWED |
| **any** | N/A |

### Response Schema Fields

None.

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## POST: Download File Analysis Report (downloadfileanalysisreport)

Download a File Analysis Report (also known as the Folder Report in the FAM module UI) for a project. This report lists information for a specified folder, such as the number of sub-folders and files, as well as information related to tagging and retention codes. It also includes details for each project directory path, such as the total size of the directory, the number of files it contains and the retention code that has been applied.

The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **adHocKey** | String | Not supported in ZL UA 11.0. Set to null value. |
| **dirId** | Integer | Specify the directory ID of the folder directory you want to view. For information on retrieving folder directory IDs, refer to *GET: Get Sub-Folders (subfolders)* on page 371. |

### Response Schema Fields

None.

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## POST: Download File Manifest Report (downloadmanifestreport)

Download a File Manifest Report for a project. This report lists the file name, folder name and path of the files included in the data set. The file names and folder paths are presented as hyperlinks which you can click to open the file (if you have access to the server machine). Excel allows a maximum of 30,000 active hyperlinks per document, so large sets of data may not include hyperlinks for every file.

The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **adHocKey** | String | Not supported in ZL UA 11.0. Set to null value. |
| **dirId** | Integer | Specify the directory ID of the folder you want to view in the report. For information on retrieving folder directory IDs, refer to *GET: Get Sub-Folders (subfolders)* on page 371. |
| **folder** | Boolean | Specify whether the report should include information for the sub-folders of the folder specified by the **dirId** field. Set to True to include information for these sub-folders. |

### Response Schema Fields

None.

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## POST: Download PII Report (downloadpiireport)

Download a PII Report for a project. The PII Report lists the files that included terms matching the PII patterns defined for your installation. This includes the file name, folder name and path of each file that included PII terms. It also includes the specific PII terms the file included, and how many times each term was found.

The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. |
| **dirId** | Integer | Specify the directory ID of the folder you want to view. For information on retrieving folder directory IDs, refer to *GET: Get Sub-Folders (subfolders)* on page 371. |
| **adHocKey** | String | Specify the directory ID of the folder you want to view. For information on retrieving folder directory IDs, refer to *GET: Get Sub-Folders (subfolders)* on page 371. |
| **folder** | Array | Specify whether the report should include information for the sub-folders of the folder specified by the **dirId** field. Set to True to include information for these sub-folders. |

### Response Schema Fields

None.

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## POST: Download Remediation Report (downloadremediationreport)

Download a Remediation Report for a project. You can assign an action (e.g. copy to a new folder, delete, archive, etc) to a tag, so that the action can be carried out upon all the files that the tag has been applied to at once. This is referred to as a remediation. The Remediation Report lists remediation actions that have been carried out within a project.

The report will be downloaded to the **Downloads** directory.

### Request Parameters

None.

### Request Body Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **runId** | Integer | Specify the Disposition Run ID. You can use the GET: Get Latest Disposition Run endpoint to retrieve the ID for the Disposition Run that was most recently executed upon a project. For more information, refer to *GET: Get Latest Disposition Run (getlatestrun)* on page 282. |
| **startDate**<br>**endDate** | String | The start date and end date for the report (inclusive). Remediation actions which occurred during this date range will be included in the report. |
| **remediationType** | Array | Specify the type of remediation action you want to view in the report:<br>• **Archive**<br>• **Copy**<br>• **Delete**<br>• **Move**<br>• **Leave**<br>• **Quarantine**<br>• **Record** |

### Response Schema Fields

None.

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## POST: Generate File Tree Disposition Report (generatedispositionreport)

Generate a Disposition Report for a Disposition Run executed upon a project. The Disposition Report is an Excel spreadsheet listing the file name, folder name and path of the files that were disposed of during the Disposition Run, as well as other file attributes such as the name, extension and type, creation and last modification date, size, record category, and disposition eligibility date. The **Disposition Status** column indicates whether each file was disposed of successfully (done) or not (done_error).

The report will be downloaded to the **Downloads** directory.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. |
| **runId** | Integer | Specify the Disposition Run ID. You can obtain Disposition Run IDs with the Get Latest Disposition Run endpoint. For more information, refer to *GET: Get Latest Disposition Run* on page 282. |
| **renderer** | String | Set to `excel` to generate the Disposition Report as an Excel spreadsheet, or `csv` to generate it as a CSV file. |
| **outputDirectory** | String | Specify the directory in which the report should be generated. For example:<br>`C:\\Users\\adunna\\Downloads\\fam` |

### Request Body Schema Fields

None.

### Response Schema Fields

None.

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## POST: Generate File Tree Pre-Disposition Report (generatepredispositionreport)

Generate a Pre-Disposition Report for a project. The Pre-Disposition Report lists the files that are eligible for disposition within the project. The report will be downloaded to the **Downloads** directory.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **renderer** | String | Set to `excel` to generate the Disposition Report as an Excel spreadsheet, or `csv` to generate it as a CSV file. |
| **outputDirectory** | String | Specify the directory in which the report should be generated. For example:<br>`C:\\Users\\adunna\\Downloads\\fam` |

### Request Body Schema Fields

None.

### Response Schema Fields

None.

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# FAM/Tasks

The ZL File Analysis and Management module includes background tasks that must be executed after the completion of certain operations. The ZL FAM module includes background tasks that must be executed after the completion of certain operations. For example, after creating a project, you would need to execute the **Run Crawl**, **Update Content Index**, **Update Index** and **Clear Cache** background tasks to scan the project directories for files and update the project's content index and tag index.

The following sections describe the FAM/Tasks endpoints available in the REST API. Use these endpoints to initiate FAM background tasks:

- *POST: Close File Tree (closeFileTree):* Close the file tree for a project. You should consider closing the file tree for projects when you are running REST API calls on many projects at once, as this will remove the project's load from the server.
- *POST: Update Content Index (updateContentIndex)*: Update the project's content index, so that you can search the contents of any new files that have been added to the project. You can specify whether you want to update the content index for an entire project, or for a specific set of files returned by a search.
- *GET: Get Task Status (getTaskStatus)*: Obtain the current status of a task.
- *POST: Run All Searches (runallsearches)*: In the FAM module, single project searches include an option to save a search so that you can access it later. Unsaved searches are retained temporarily. Execute the Run All Searches task to re-run these searches and update the search results.
- *POST: Run Content Tagger (runcontenttagger)*: Run this task after uploading a tag specification to apply the tags defined in the specification to the files included in the project.
- *POST: Run Crawl (runcrawl*): Scan the project directories specified for a project and adds the contents to the project.
- *POST: Run Metadata Tagger (runmetadatatagger)*: Applies any metadata tag specifications that have been added to the project to the project files. A metadata tag specification defines a set of rules that will be checked against each file‘s metadata properties (e.g., date created, date last modified, date last accessed, ACL owner), and applies tags to the files matching those rules.
- *POST: Run PII Tagger (runpiitagger)*: Applies the tags defined in any PII tag specifications the project includes to the files included in the project.
- *POST: Run Remediation Task (runremediation)*: Execute the Run Remediation task on a project. All remediation actions configured for the project will be performed when you run this task.
- *POST: Update Index (updateindex):* Updates the tagging information for the files included in the project.FAM/Project Privileges

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## POST: Close File Tree (closeFileTree)

Close the file tree for a project. You should consider closing the file tree for projects when you are running REST API calls on many projects at once, as this will remove the project's load from the server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Response Schema Fields

A string indicating whether the file tree was closed successfully.

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## POST: Update Content Index (updateContentIndex)

Start the Update Content Index task for a project. This task updates the project's content index, so that you can search the contents of any new files that have been added to the project. You can specify whether you want to update the content index for an entire project, or for a specific set of files returned by a search.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **idProj** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **filesToIndex** | String | Specify which files you want to update:<br>• **indexAll:** The entire project.<br>• **indexSavedSearches:** A saved search.<br>• **indexSampledOnly:** Sampled files only. |
| **searchNames** | Array | If you specified **indexSavedSearches** as the **Files to Index** parameter, specify the name(s) of the saved search(es) to update. The files returned by that search will be updated.<br>If you want to update the files returned by multiple saved searches, specify the search names as a comma-separated list. For example:<br>`"SearchNames": [ "sa1","sa2" ]` |

### Response Schema Fields

A string indicating whether the task was executed successfully.

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## GET: Get Task Status (getTaskStatus)

Obtain the status of a task that is being run on a project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **stTask** | String | Select the task whose status you want to obtain: MetadataCrawl, ContentIndexing, UpdateIndex, MetadataTagger, ConceptTagger, PiiTagger, PurgeDocuments, Remediation, or RunAllSearch. |
| **current** | String | Specify whether you want to obtain the status of the current invocation of the task, or the previous invocation of the task. |

### Request Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Key** | String | The task key. |
| **taskName** | String | The task name. |
| **startTime**<br>**endTime** | Integer | The time that the task started and ended. These times are delivered as epoch timestamps. For more information on epoch timestamps, refer to:<br>https://www.epochconverter.com/ |
| **elapsedTime** | Integer | The amount of time the task has taken, in milliseconds. |
| **taskSuccess** | Boolean | Set to True if the task has completed successfully. |
| **taskMessage** | String | A message describing the current status of the task. |
| **taskErrorMessage** | String | A message describing any error conditions which occurred. |
| **known** | Boolean | Indicates whether it is a known task (True) or not (False). |
| **pid** | String | The process ID assigned to the task. |

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## POST: Run All Searches (runallsearches)

In the FAM module, single project searches include an option to save a search so that you can access it later. Unsaved searches are retained temporarily. Execute the Run All Searches task to re-run these searches and update the search results.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project whose searches you want to run. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the task was executed successfully.

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## POST: Run Content Tagger (runcontenttagger)

Run the Content Tagger task on a project. You can run this task after uploading a tag specification to apply the tags defined in the specification to the files included in the project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project you want to run the task on. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the task was executed successfully.

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## POST: Run Crawl (runcrawl)

Execute the Run Crawl task on a project. This task scans the project directories specified for the project and add the contents to the project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project you want to crawl. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the task was executed successfully.

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## POST: Run Metadata Tagger (runmetadatatagger)

Execute the Run Metadata Tagger task on a project. This applies any metadata tag specifications that have been added to the project to the project files. A metadata tag specification defines a set of rules that will be checked against each file's metadata properties (e.g., date created, date last modified, date last accessed, ACL owner), and applies tags to the files matching those rules.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project you want to run the task on. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the task was executed successfully.

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## POST: Run PII Tagger (runpiitagger)

Execute the Run PII Tagger task on a project. This applies the tags defined in any PII tag specifications the project includes to the files included in the project. PII tag specifications are compared to each file's content to search specifically for files that include personal information such as credit card numbers, social security numbers, and addresses, and applies tags to the files matching the specification parameters.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project you want to run the task on. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the task was executed successfully.

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## POST: Run Remediation Task (runremediation)

In ZL UA, you can assign an action (e.g., copy to a new folder, delete, archive, etc) to a tag, so that the action can be carried out upon all the files that the tag has been applied to at once. This is referred to as a remediation. Use this endpoint to execute the Run Remediation task on a project. All remediation actions configured for the project will be performed when you run this task.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project you want to run the task on. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the task was executed successfully.

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## POST: Update Index (updateindex)

Execute the Update Index task on a project. This updates the tagging information for the files included in the project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project you want to run the task on. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the task was executed successfully.

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# UAA/Policies

ZL UA allows users to create and configure system-wide policies that are used to determine factors such as which files will be ingested into ZL UA during scanning and whether those files will be indexed upon ingestion. When setting up a ZL UA installation, you will be required to create **File Archiving** and **File In Place** policies. The following sections describe these policy types.

## File Archiving and File In Place Polices

Files can be ingested into ZL UA as *archived data* or as *In-Place Data:*

- **Archived Data:** A copy of each file is added to the ZL Vault when it is ingested.
- **In-Place Data:** The data is managed "virtually" with ZL UA, meaning that data for each file is extracted from the source servers, but the files are not copied into the ZL Vault, enhancing performance and storage.

You can create File Archiving Policies to determine which files will be archived and copied into the ZL Vault, and File In Place policies to determine which files will be indexed as In-Place Data.

## Notes on Enterprise Files Management (EFM) Installations

As of the release of ZL UA 11.0, the EFM module is only supported for use with In-Place Data. As a result, you must create a File Archiving policy with the **Archive Action** set to **Don't Archive** for use with your EFM projects**.** File Archiving policies determine which files will be archived into the ZL Vault during scanning. Creating such a policy and assigning it to the projects you plan to use with the EFM module will ensure that the data scanned for the project is ingested as In-Place data and will be available in the EFM module.

You must make sure that the policy will be applicable to all files you plan to use with the EFM module. You can do so by creating a policy rule for the policy. A policy rule defines file characteristics that will be checked as the files are ingested. If a file matches the characteristics defined for any of the policy's rules, then the tag associated with the policy will be applied to that file. In this case, you could create a policy with a policy rule that checks file sizes and is applicable to all files 0 bytes or greater to ensure that all files meet the characteristics.

You must also create a File In Place policy which determines whether the files you plan on using with the EFM module will be indexed. You must again ensure that this policy will be applicable to all files, as demonstrated for **File Archiving** policies above. You must also make sure to select a **File In Place Policy** that is appropriate for your project's crawl type:

- **Metadata Analysis (No Index):** Set **File In Place Policy** to **No Index**
- **Metadata Index + Content Analysis:** Set **File In Place Policy** to **Index All**
- **Metadata Analysis + Content Analysis + Content Index:** Set **File In Place Policy** to **Index All**

**File Record Category Declaration Policies**

A new type of policy has been added to the UAA module to support the EFM module: *File Record Category Declaration Policies.* File Record Category Declaration Policies are used to determine which Record Categories

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should be applied to the files that are ingested into ZL UA. This is determined by the *policy rules* you will add to each policy.

A policy rule defines file conditions that will be checked as the files are ingested. If a file matches the conditions defined for a policy rule, then the Record Category associated with the rule will be applied to that file. Each policy supports multiple policy rules, providing a wide range of flexibility in assigning Record Categories to files. You can prioritize the policy rules that have been added to a policy to determine which rule to apply to a file if it matches the characteristics of more than one rule.

For example, you could create a File Record Category Declaration Policy that applies a specific Record Category to files that are of a certain size or were last modified during a specific date range. Alternatively, you could create a File Record Category Declaration Policy that searches the file contents for specific words and applies tags to files that include (or do not include) those words. ZL UA provides many different options you can use to create policy rules.

## Endpoints for Policy Management

The following sections describe the UAA/Policies endpoints available in the REST API. Use these endpoints to create and manage policies and policy rules*:*

- *POST: Create File Archiving Policy Rule (createFileArchivingPolicyRule)*
- *PUT: Update File Archiving Policy Rule (updateFileArchivingPolicyRule)*
- *POST: Create File-In-Place Policy Rule (createFileInPlacePolicyRule)*
- *PUT: Update File-in-Place Policy Rule (updateFileInPlacePolicyRule)*
- DELETE*: Delete Policy Rule (deletePolicyRuleUsingId)*
- *POST: Create Policy (createPolicy)*
- *DELETE: Delete Policy (deletePolicyUsingId)*
- *POST: Get Policies Using Policy ID (getPolicyUsingId)*
- *GET: Get Policies Using Type (getPoliciesUsingType)*
- *GET: Get Policy Rules Using ID (getPolicyRulesUsingId)*

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## POST: Create File Archiving Policy Rule (createFileArchivingPolicyRule)

Add a policy rule to a File Archiving policy.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **policyId** | Integer | The ID of the policy to which you want to add the rule to. You can use the *POST: Get Policy Using Policy ID* endpoint to retrieve policy ID values. For more information, refer to *POST: Get Policy Using Policy ID* on page 323. |
| **policyRuleId** | Integer | Ignore this field when creating a policy rule. Use it to specify the ID of the rule when updating one with the PUT: Update Policy Rule endpoint.<br>You can use the GET: Get Policy Rules Using ID endpoint to retrieve policy rule ID values. For more information, refer to *GET: Get Policy Rules Using ID* on page 325. |
| **policyRuleName** | String | The name of the policy rule (required). |
| **policyRuleDesc** | String | A description of the policy rule. |
| **policyRuleActionCode** | Integer | The action code for the policy rule. This identifies the action to be taken upon files the policy is applied to:<br>• **-1: Archive**<br>• **0: Don't Archive**<br>• **2: Delete** |
| **listPolicyRuleConditions:** Includes an entry for each condition that you plan to add to the policy rule. Each file will be checked against these conditions to determine if the policy rule and the associated action will be applied to that file. Each entry includes the following fields:<br>• **field**<br>• **subfield**<br>• **operator**<br>• **pattern**<br>Refer to the following table for guidance on configuring these fields. You must create at least one rule condition, and you can create a maximum of 4 conditions. | | |

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### Configuring Policy Rule Conditions for EFM Installations

The following table lists the values you can use to define policy rule conditions. Remember that as of the release of ZL UA 11.0, the EFM module is only supported for use with In-Place Data. As a result, you must create a File Archiving policy with the **Archive Action** set to **Don't Archive** for use with your EFM projects**.**

You must make sure that the policy will be applicable to all files you plan to use with the EFM module. You can do so by creating a policy rule for the policy. A policy rule defines file characteristics that will be checked as the files are ingested. If a file matches the characteristics defined for any of the policy's rules, then the tag associated with the policy will be applied to that file. In this case, you could create a policy with a policy rule that checks file sizes and is applicable to all files 0 bytes or greater to ensure that all files meet the characteristics.

You could use the following values for this rule condition:

- **Field: FileSize**
- **Subfield: Leave blank.**
- **Operator**: **IntGreaterThanEquals**
- **Pattern**: **0**

| Field | Subfield | Operators | Pattern Constraint |
|---|---|---|---|
| **Age** | | **IntLessThan** | **Integer** |
| | | **IntGreaterThanEquals** | **Integer** |
| **FileSize** | | **IntLessThan** | **Integer** |
| | | **IntGreaterThanEquals** | **Integer** |
| **relPath** | | **Like** | |
| | | **LikeIgCase** | |
| **FileName** | | **FileExtensionEquals** | |
| | | **FileExtensionNotEquals** | |
| | | **Equals** | |
| | | **EqualsIgCase** | |
| | | **LikeIgCase** | |
| | | **NotLikeIgCase** | |
| | | **ContainsWord** | |

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| Field | Subfield | Operators | Pattern Constraint |
|---|---|---|---|
| | | NotContainsWord | |
| FileType | | FileExtensionEquals | |
| | | FileExtensionNotEquals | |
| | | Equals | |
| | | EqualsIgCase | |
| | | LikeIgCase | |
| | | NotLikeIgCase | |
| | | ContainsWord | |
| | | NotContainsWord | |
| FileLastModified | | DateLaterThan | Valid calendar date in YYYY/MM/DD format |
| | | DateEarlierThan | Valid calendar date in YYYY/MM/DD format |
| LastModifiedAge | | IntLessThan | |
| | | IntGreaterThanEquals | |
| FileLastAccessed | | DateLaterThan | Valid calendar date in YYYY/MM/DD format |
| | | DateEarlierThan | Valid calendar date in YYYY/MM/DD format |
| LastAccessedAge | | IntLessThan | |
| | | IntGreaterThanEquals | |

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| Field | Subfield | Operators | Pattern Constraint |
|---|---|---|---|
| fileCustProp | Any Additional metadata field | Equals | |
| | | EqualsIgCase | |
| | | ContainsWord | |
| | | NotContainsWord | |
| | | LikeIgCase | |
| | | NotLikeIgCase | |
| | | IntLessThan | Integer |
| | | IntGreaterThanEquals | Integer |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema, as well as the following additional fields:

- **policyRuleId:** The ID assigned to the policy rule and a timestamp indicating when it was created.
- **policyRuleActionCode:** Please disregard this field. It is hard-coded to 0.

  **policyRuleConditionsDesc:** This is a concise description of all the conditions of a policy rule. For example, a policy rule written to apply to text files that were last accessed later than October 8, 2024 would appear as follows:
  `"IF File Last Accessed Date Later Than '2024/10/08 ' AND File Type Equals (Match case) '.txt' "`
- **policyRuleActionDisplay:** A description of the action type assigned to the policy rule.
- **policyActionParms:** This includes the action parameters configured for the policy rule. For example:

```
"policyActionParams": {
    "Archive Action": "0",
}
```

These fields define the policy rule configuration.

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## PUT: Update File Archiving Policy Rule (updateFileArchivingPolicyRule)

Update a File Archiving policy rule.

### Request Parameters

None.

### Request Body Schema Fields

The schema fields required to update the File Archiving policy rule's configuration are the same as those that must be specified when creating the policy rule, as described in *POST: Create File Archiving Policy Rule on* page 309. You must also specify an ID value to identify the policy rule being updated.

### Response Schema Fields

The schema fields returned for the policy rule are the same as those required in the request schema when creating it. They represent the configuration of the File Archiving policy rule, as described ion *POST: Create File Archiving Policy Rule on* page 309.

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## POST: Create File-In-Place Policy Rule (createFileInPlacePolicyRule)

Add a policy rule to a File-In-Place policy.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **policyId** | Integer | The ID of the policy to which you want to add the rule. You can use the *POST: Get Policy Using Policy ID* endpoint to retrieve policy ID values. For more information, refer to *POST: Get Policy Using Policy ID* on page 323. |
| **policyRuleId** | Integer | Ignore this field when creating a policy rule. Use it to specify the ID of the rule when updating it with the PUT endpoint.<br>You can use the GET: Get Policy Rules Using ID endpoint to retrieve policy rule ID values. For more information, refer to *GET: Get Policy Rules Using ID* on page 325. |
| **policyRuleName** | String | The name of the policy rule (required). |
| **policyRuleDesc** | String | A description of the policy rule. |
| **policyRuleActionCode** | Integer | The action code for the policy rule. This identifies the action to be taken upon files the policy is applied to:<br>• **-1: Don't Index**<br>• **0: Index** |
| **listPolicyRuleConditions:** Includes an entry for each condition that you plan to add to the policy rule. Each file will be checked against these conditions to determine if the policy rule and the associated action will be applied to that file. Each entry includes the following fields:<br>• **field**<br>• **subfield**<br>• **operator**<br>• **pattern**<br>Refer to the following table for guidance on configuring these fields. You must create at least one rule condition, and you can create a maximum of 4 conditions. | | |

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### Configuring Policy Rule Conditions in an EFM Installation

The following table lists the values you can use to define policy rule conditions. Remember that you must create a File In Place policy which determines whether the files you plan on using with the EFM module will be indexed. You must again ensure that this policy will be applicable to all files, as demonstrated for **File Archiving** policies earlier. You could use the following values for this rule condition:

- **Field: FileSize**
- **Subfield: Leave blank.**
- **Operator**: **IntGreaterThanEquals**
- **Pattern**: **0**

| Field | Subfield | Operators | Pattern Constraint |
|---|---|---|---|
| Age | | IntLessThan | Integer |
| | | IntGreaterThanEquals | Integer |
| FileSize | | IntLessThan | Integer |
| | | IntGreaterThanEquals | Integer |
| relPath | | Like | |
| | | LikeIgCase | |
| FileName | | FileExtensionEquals | |
| | | FileExtensionNotEquals | |
| | | Equals | |
| | | EqualsIgCase | |
| | | LikeIgCase | |
| | | NotLikeIgCase | |
| | | ContainsWord | |
| | | NotContainsWord | |
| FileType | | FileExtensionEquals | |
| | | FileExtensionNotEquals | |

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| Field | Subfield | Operators | Pattern Constraint |
|---|---|---|---|
| | | Equals | |
| | | EqualsIgCase | |
| | | LikeIgCase | |
| | | NotLikeIgCase | |
| | | ContainsWord | |
| | | NotContainsWord | |
| FileLastModified | | DateLaterThan | Valid calendar date in YYYY/MM/DD format |
| | | DateEarlierThan | Valid calendar date in YYYY/MM/DD format |
| LastModifiedAge | | IntLessThan | |
| | | IntGreaterThanEquals | |
| FileLastAccessed | | DateLaterThan | Valid calendar date in YYYY/MM/DD format |
| | | DateEarlierThan | Valid calendar date in YYYY/MM/DD format |
| LastAccessedAge | | IntLessThan | |
| | | IntGreaterThanEquals | |
| fileCustProp | Any Additional metadata field | Equals | |

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| Field | Subfield | Operators | Pattern Constraint |
|---|---|---|---|
| | | **EqualsIgCase** | |
| | | **ContainsWord** | |
| | | **NotContainsWord** | |
| | | **LikeIgCase** | |
| | | **NotLikeIgCase** | |
| | | **IntLessThan** | **Integer** |
| | | **IntGreaterThanEquals** | **Integer** |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema, as well as the following additional fields:

- **policyRuleId:** The ID assigned to the policy rule and a timestamp indicating when it was created.
- **policyRuleActionCode:** Please disregard this field. It is hard-coded to 0.

  **policyRuleConditionsDesc:** This is a concise description of all the conditions of a policy rule. For example, a policy rule written to apply to text files that were last accessed later than October 8, 2024 would appear as follows:
  `"IF File Last Accessed Date Later Than '2024/10/08 ' AND File Type Equals (Match case) '.txt' "`
- **policyRuleActionDisplay:** A description of the action type assigned to the policy rule.
- **policyActionParms:** This includes the action parameters configured for the policy rule. For example:

```
"policyActionParams": {
    "Archive Action": "0",
}
```

These fields define the policy rule configuration.

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## PUT: Update File-in-Place Policy Rule (updateFileInPlacePolicyRule)

Update a File-in-Place policy rule.

### Request Parameters

None.

### Request Body Schema Fields

The schema fields required to update the policy rule's configuration are the same as those that must be specified when creating the policy rule, as described in *POST: Create File-In-Place Policy Rule* on page 314. You must also specify an ID value to identify the policy rule being updated.

### Response Schema Fields

The schema fields returned for the project are the same as those required in the request schema when creating it (or when updating it using this endpoint). They represent the configuration of the policy rule, as described in *POST: Create File-In-Place Policy Rule* on page 314.

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## DELETE: Delete Policy Rule (deletePolicyRuleUsingId)

Delete a policy rule.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **policyId** | Integer | Specify the ID of the policy rule to be deleted, and of the policy that the rule belongs to. You can use the *POST: Get Policy Using Policy ID* endpoint to retrieve policy ID and policy rule ID values. For more information, refer to *POST: Get Policy Using Policy ID* on page 323 |
| **policyRuleId** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the policy rule was deleted successfully.

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## POST: Create Policy (createPolicy)

Create a policy.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **policyName** | String | Enter the policy name. |
| **policyDesc** | String | Enter a description of the policy. |
| **policyType** | String | Specify the policy type:<br>• File Archiving Policy: Enter **FileArchiving**<br>• In Place Policy: Enter **FileInPlaceItemIndex**<br>• File Record Declaration Policy: Enter **FileRecordDeclaration** |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **policyName** | String | The policy name. |
| **policyDesc** | String | The policy description. |
| **policyType** | String | The policy type. |
| **Id** | Integer | The ID assigned to the policy. |
| **createDate** | String | The date and time the policy was created. |

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| Schema Field | Type | Description |
|---|---|---|
| **policyRules** | Array | An array of **policyRule** entries, where each entry defines the configuration of a policy rule that has been added to the policy. You must create policy rules and assign them to policies with the *POST: Create File Archiving Policy Rule* and *POST: Create File-In-Place Policy Rule* endpoints.<br><br>For descriptions of these endpoints and of the fields that define the configuration of each policy rule, refer to the following sections: *POST: Create File Archiving Policy Rule* on page 309 or *POST: Create File-In-Place Policy Rule* on page 314. |

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## DELETE: Delete Policy (deletePolicyUsingId)

Delete a policy.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **policyId** | Integer | Specify the ID of the policy to be deleted. You can use the *POST: Get Policy Using Policy ID* endpoint to retrieve policy ID values. For more information, refer to *POST: Get Policy Using Policy ID* on page 323. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the policy was deleted successfully.

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## POST: Get Policies Using Policy ID (getPolicyUsingId)

Retrieve a policy configurations by specifying its ID value.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **items** | Integer | Enter a comma-separated list of policy IDs to specify the policies whose configurations are to be retrieved. If you specify an ID for which there is no policy created, it will skip that ID. If all the specified IDs are invalid, an error will be generated. If you do not provide any input, then the configurations of all the policies will be retrieved and displayed in a list format. |

### Response Schema Fields

This endpoint returns an entry for each policy specified in the input. Each entry begins with a series of fields that represent the basic configuration of a policy (e.g., **policyName**, **policyDesc** and **policyType**). This is followed by an array of **policyRules** entries, each of which defines the configuration of a rule that has been added to the policy.

These are the same fields that you specified when creating or updating the policy and when adding rules to it. For descriptions of these fields, refer to the following sections:

- For descriptions of general policy configuration fields, refer to *POST: Create Policy* on page 320.
- For descriptions of policy rule configuration fields, refer to the following sections: *POST: Create File Archiving Policy Rule* on page 309 or *POST: Create File-In-Place Policy Rule* on page 314.

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## GET: Get Policies Using Type (getPoliciesUsingType)

Retrieve all policy configurations for a specific policy type.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |
| **stType** | String | Specify the policy type:<br>• File Archiving Policy: Enter **FileArchiving**<br>• File In Place Policy: Enter **FileInPlaceItemIndex**<br>• File Record Lifecycle Declaration Policy: Enter **FileRecordDeclaration**<br>• Retention Policy: Enter **FileRetention**<br>• Sampling Policy: Enter **FileSampling**<br>• Stubbing Policy: Enter **FileStubbing**<br>• OCR Conversion Policy: Enter **OCRConversion** |

### Request Body Schema Fields

None.

### Response Schema Fields

This endpoint returns an entry for each policy specified in the input. Each entry begins with a series of fields that represent the basic configuration of a policy (e.g., **policyName**, **policyDesc** and **policyType**). This is followed by an array of **policyRules** entries, each of which defines the configuration of a rule that has been added to the policy.

These are the same fields that you specified when creating or updating the policy and when adding rules to it. For descriptions of these fields, refer to the following sections:

- For descriptions of general policy configuration fields, refer to *POST: Create Policy* on page 320.
- For descriptions of policy rule configuration fields, refer to the following sections: *POST: Create File Archiving Policy Rule* on page 309 or *POST: Create File-In-Place Policy Rule* on page 314.

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## GET: Get Policy Rules Using ID (getPolicyRulesUsingId)

Retrieve a policy rule's configuration by specifying its ID value (and the ID of the policy it belongs to).

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **policyId** | Integer | Specify the ID of the policy rule whose configuration is to be retrieved, and of the policy that the rule belongs to. You can use the *POST: Get Policy Using Policy ID* endpoint to retrieve policy ID and policy rule ID values. For more information, refer to *POST: Get Policy Using Policy ID* on page 323. |
| **policyRuleId** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns a series of fields defining the policy rule's configuration. These are the same fields you specified when creating the policy rule. For descriptions of policy rule configuration fields, refer to the following sections: *POST: Create File Archiving Policy Rule* on page 309 or *POST: Create File-In-Place Policy Rule* on page 314.

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# FAM/Project Privileges

In the FAM module, privileges are granted to users or to security groups to allow them to perform additional actions on a project. Privileges are granted on a project-by-project basis, so a user or security group can have different privilege levels for different projects. An example of a privilege that can be granted to users or security groups is the “Search” privilege.

The following sections describe the FAM/Project Privileges endpoints available in the REST API:

- *PUT: Add or Grant Group Project Privileges (addgroupprojectprivileges, grantgroupprivileges)*: Assign project privileges to a security group.
- *PUT: Add or Grant User Project Privileges (adduserprojectprivileges, grantuserprojectprvileges):* Assign project privileges to a user.
- *GET: Get Project Entity IDs (getprojectentityids):* Get project entity IDs for a project. Each project entity represents a user or security group that has been assigned privileges within the project.
- *GET: Get Project Entity Privileges (getprojectentityprivileges)*: Get project entity privileges for a project. Each entity represents a user or security group that has been assigned a set of permissions within the project.
- *GET: Get Project Entity Types (getprojectentitytypes)*: Get project entity types for a project. Each entity represents a group of users that have been assigned a set of permissions within the project.
- *GET: Get Project Privileges Using Project ID (getprojectprivileges):* Get the project privileges that have been assigned within a project.
- *PUT: Revoke All Project Privileges (revokeallprojectprivileges):* Revoke all privileges that have been assigned within a project.
- *PUT: Revoke Group Project Privileges (revokegroupprojectprivileges):* Revoke project privileges from a security group.
- *PUT: Revoke User Project Privileges (revokeuserprojectprivileges):* Revoke project privileges from a user.

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## PUT: Add or Grant Group Project Privileges (addgroupprojectprivileges, grantgroupprivileges)

Assign project privileges to a security group. Please note that **addgroupprojectprivileges** can only be used to assign privileges to a single security group, and **grantgroupprivileges** can be used to assign privileges to multiple security groups.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **zlpUserIds** | Integer | For **addgroupprivileges**, specify the ZLP user ID of the security group to grant the privileges to. For example:<br>`"zlpUserIds": [ 0 ]`<br>For **grantgroupprojectprivileges**, specify a list of ZLP user IDs to specify the security groups to grant the privileges to. Specify the group IDs as a comma-separated list. For example:<br>`"zlpUserIds": [ 0,1,2,3 ]`<br>The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| The remaining fields are Boolean values. Set to True to grant the privilege to the security groups specified in the request. | | |
| **fProjectAdminPrivilege** | Boolean | Has access to all FAM functionality for the project: project configurations, administrative tasks, tag management, searches, reports, audit trails and granting project roles to other users. |
| **fReadPrivilege** | Boolean | Can view the contents of the project, and run reports. |

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| Schema Field | Type | Description |
|---|---|---|
| **fAnalyticsReview** | Boolean | Can view the contents of the project, tag items, and run searches and reports |
| **fAnalyticsSearch** | Boolean | Can view the contents of the project and run searches and reports. |
| **fAnalyticsAudits** | Boolean | Can view audit trails, view the contents of the project, and run reports. |
| **fRetentionApproval** | Boolean | Can approve the destruction of files that are eligible for disposition because their records management lifecycle has expired. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **entityId** | Integer | The ID assigned to the project entity created by the request. Each project entity represents a user or security group that has been assigned privileges within the project, and you can use the ID to retrieve information regarding this with other endpoints. |
| **entityType** | Integer | The entity type. |
| **projectPrivileges** | String | An array of strings identifying the privileges assigned to the security group. |

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## PUT: Add or Grant User Project Privileges (adduserprojectprivileges, grantuserprojectprvileges)

Assign project privileges to a user or group of users.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **zlpUserIds** | Integer | An array of user IDs to specify the users to whom the project privileges should be granted. Specify the user IDs as a comma-separated list. For example:<br>`"zlpUserIds": [ 0,1,2,3 ]`<br>The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| The remaining fields are Boolean values. Set to True to grant the privilege to the users specified in the request. | | |
| **fProjectAdminPrivilege** | Boolean | Has access to all FAM functionality for the project: project configurations, administrative tasks, tag management, searches, reports, audit trails and granting project roles to other users. |
| **fReadPrivilege** | Boolean | Can view the contents of the project, and run reports. |
| **fAnalyticsReview** | Boolean | Can view the contents of the project, tag items, and run searches and reports |
| **fAnalyticsSearch** | Boolean | Can view the contents of the project and run searches and reports. |
| **fAnalyticsAudits** | Boolean | Can view audit trails, view the contents of the project, and run reports. |
| **fRetentionApproval** | Boolean | Can approve the destruction of files that are eligible for disposition because their records management lifecycle has expired. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **entityId** | Integer | The ID assigned to the privileges entity created by the request. |
| **entityType** | Integer | The entity type. |
| **projectPrivileges** | String | An array of strings identifying the privileges assigned to the user. |

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## GET: Get Project Entity IDs (getprojectentityids)

Get project entity IDs for a project. Each project entity represents a user or security group that has been assigned privileges within the project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project from which you want to retrieve the information. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Entity IDs:** Includes the following fields for each project entity that has been created within the project. Each project entity represents a user or security group that has been assigned privileges within the project. | | |
| **userName** | String | The name of the user or security group. |
| **entityId** | Integer | The entity ID assigned to the project entity. |

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## GET: Get Project Entity Privileges (getprojectentityprivileges)

Get project entity privileges for a project. Each entity represents a user or security group that has been assigned a set of permissions within the project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project from which you want to retrieve the information. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Storage Project Entity Privileges:** Includes an entry for each project entity that has been created within the project. Each project entity represents a user or security group that has been assigned privileges within the project. The fields included in each entry are described below: | | |
| **userName** | String | The name of the user or security group. |
| **entityPrivileges** | Includes the entity ID, entity type, and a list of privileges assigned to the user or security group. | |

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## GET: Get Project Entity Types (getprojectentitytypes)

Get project entity types for a project. Each entity represents a group of users that have been assigned a set of permissions within the project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project from which you want to retrieve the information. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Entity Types:** Includes an entry for each project entity that has been created within the project. Each project entity represents a user or security group that has been assigned privileges within the project. The fields included in each entry are described below: | | |
| **userName** | String | The name of the user or security group. |
| **entityType** | Integer | The entity type. |

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## GET: Get Project Privileges Using Project ID (getprojectprivileges)

Get the project privileges that have been assigned within a project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project from which you want to retrieve the information. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **User/Security Group Project Privileges:** Includes an entry that includes the following fields for each user or security group that has been assigned privileges within the project. | | |
| **username** | String | The name of the user or security group. |
| **privileges** | String | The privileges assigned to the user or security group. |

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## PUT: Revoke All Project Privileges (revokeallprojectprivileges)

Revoke all privileges that have been assigned within a project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project from which you want to revoke privileges. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string message indicating whether the privileges were successfully revoked or not.

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## PUT: Revoke Group Project Privileges (revokegroupprojectprivileges)

Revoke privileges that have been assigned to a specific list of security groups within a project.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **zlpUserIds** | Integer | An array of group IDs to specify the security groups from which the project privileges should be revoked. Specify the group IDs as a comma-separated list. For example:<br>`"zlpUserIds": [ 0,1,2,3 ]`<br>The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Additional Prop:** Includes the following fields for each security group specified in the request. | | |
| **success** | Boolean | Indicates whether privileges were revoked from the security group successfully (True) or not (False). |
| **result** | String | The result of the request. If **Success** is set to True, a message will display indicating that privileges have been revoked. |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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## PUT: Revoke User Project Privileges (revokeuserprojectprivileges)

Revoke privileges that have been assigned to a specific list of users within a project.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the project ID. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **zlpUserIds** | Integer | An array of user IDs to specify the users from whom the project privileges should be revoked. Specify the user IDs as a comma-separated list. For example:<br>`"zlpUserIds": [ 0,1,2,3 ]`<br>The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Additional Prop:** Includes the following fields for each user specified in the request. | | |
| **success** | Boolean | Indicates whether privileges were revoked from the group successfully (True) or not (False). |
| **result** | String | The result of the request. If successful, a message will be displayed that privileges have been revoked. |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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# UAA/Projects

A project is essentially a list of folders or sites that is grouped together to be scanned whenever a server is crawled. Projects are created to determine which system directories or sites (and, subsequently, which items) in the selected server are to be archived and/or managed in place.

The following sections describe the UAA/Projects endpoints available in the REST API. Use these endpoints to create and manage Google Drive, OneDrive, SharePoint, Box and File Share projects:

- *POST: Create Google Drive Project (creategoogledriveproject)*
- *POST: Create OneDrive Project (createonedriveproject)*
- *PUT: Update OneDrive Project (updateonedriveproject)*
- *POST: Create File Share Project (createfileshareproject)*
- *PUT: Update File Share Project (updatefileshareproject)*
- *POST: Create SharePoint Project (createsharepointproject)*
- *POST: Create Box Project (createboxproject)*
- *PUT: Update Box Project (updateboxproject)*
- *DELETE: Remove Project (deleteusingid)*
- *GET: Get All Projects (getallprojects)*
- *GET: Get Sub-Folders (subfolders)*
- *GET: Get Project Info by ID (getprojectusingid)*
- *GET: Get Project Info by Name (getprojectusingname)*
- *GET: Get Projects of File Server (getprojectsusingidfileserver)*
- *GET: Get Projects Using Search (getprojectusingpatternsearch)*
- *POST: Make Directory Spec (makeDirectorySpec)*
- *POST: Crawl Project (runcrawl)*
- *GET: Get Task Status (gettaskstatus)*
- *GET: Get Previous Task Status (getprevioustaskstatus)*

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## POST: Create Google Drive Project (creategoogledriveproject)

Create a project on a Google Drive server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **sharedDrive** | Boolean | Set to True if this is a shared drive. |
| **projectInfo:** Defines project configuration information. | | |
| **id** | Integer | Specify the project ID. This is only required when updating a Google Drive project with the PUT endpoint. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370.. |
| **ownerId** | Integer | Specify the ZLP user ID assigned to the user who should be the project owner. For policy resolution and ease of management purposes, the project will be associated with the department of the ZL UA user specified as the project owner. |
| **type** | Integer | Specify the project type. Enter 7 for Google Drive. |
| **name** | String | Specify the project's name. |
| **displayName** | String | Specify the project's display name. |
| **mailServerId** | Integer | Type the server ID assigned to the project's server. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **domainId** | Integer | Specify the domain ID. |
| **crawlType** | Integer | Specify the crawl type:<br>• 400: Metadata Analysis (No Index)<br>• 200: Metadata Index + Content Analysis<br>• 100: Metadata Index + Content Analysis + Content Index |

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| Schema Field | Type | Description |
|---|---|---|
| **scheduleStartDate**<br>**scheduleEndDate** | String | Specify the start and end dates during which disposition should be carried out upon the project. Use the following formats for dates:<br>YYYY-MM-DDTMM:HH:SS.SSZ<br>For example:<br>**2024-11-01T11:05:44.575Z**<br>This setting is applicable to projects where the Disposition Workflow is enabled, meaning that the **disposition_enabled** setting is set to True. In addition, scheduling for the Disposition Workflow must be enabled, meaning that the **fScheduleEnabled** setting is set to True. |
| **fScheduleEnabled** | Boolean | Specify whether disposition scheduling should be enabled for the project. This setting is applicable to projects where the disposition setting (**disposition_enabled**) is enabled. |
| **allowVersioning** | Boolean | Specify whether file versioning should be used in this project. |

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| Schema Field | Type | Description |
|---|---|---|
| **flags** | Boolean | A set of Boolean values used to specify whether each project attribute should be enabled or not. Set to True to enable, or False to disable.<br>• **allowsAddition**: Allow new files to be added to the project during file crawls.<br>• **disable_acl_capture**: Disable the capture of ACL permissions for all folders and files in the project. In this case, the ZL File Connector will not check the ACL permissions while crawling.<br>• **add_users_based_folder_acl**: Any ZL UA user with at least 'Read' ACL privileges for a folder within the project will automatically have access to the folder in the project in the ZL File Archiving application.<br>• **fetch_file_acl**: Retrieve the ACL list for each file included in the project.<br>• **crawlfetchlatestver**: Retrieve the latest versions of previously added files during project crawls.<br>• **lock_crawl**: Disable future crawls of the project.<br>• **disable_full_crawl**: Indicate whether the entire project should be scanned (and subject to archiving) when it is crawled.<br>• **disposition_enabled**: Enable disposition on the project. Disposition is the process by which files whose records management lifecycle has expired are deleted and removed from the ZL UA system.<br>• **disposition_approval_required**: Require approval for Disposition Runs within the project. |

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| Schema Field | Type | Description |
|---|---|---|
| **folderRoot** | These fields are output fields are used to define the project's root folder. Input is not required here when using the endpoint. | |
| **dirId** | String | Input to these fields is not required. |
| **parentId** | Integer | |
| **name** | String | |
| **displayName** | String | |
| **description** | String | |
| **relativePath** | String | |
| **type** | Integer | |
| **storageSize** | Integer | |
| **itemCount** | Integer | |
| **deleted** | Boolean | This field is used for output purposes. Not required. |
| **dirSpec** | Specify which folders and sub-folders will be included in the project. Each entry in the `allEntry` array identifies a project folder and includes the following fields: | |
| **symbolicLink** | String | The path display name. |
| **rootPath** | String | Specify the root path of the folder. For example:<br>`C:\\Users\\bross\\Downloads\\fileset`<br>You could also specify the path as:<br>`C:/Users/bross/Downloads/fileset` |
| **exclusionPathSet** | String | Specify the relative paths of any sub-folders that should not be included when crawling the project. For example:<br>`C:\\Users\\adunna\\Downloads\\fam`<br>You could also specify the path as:<br>`C:/Users/adunna/Downloads/fam` |
| **treeCrawl** | Boolean | These fields are for output purposes. No input is required. |

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| Schema Field | Type | Description |
|---|---|---|
| **propertyMap** | String | |
| **privilegesSettings** | Boolean | A set of Boolean values used to specify the default permissions users should be granted for the project:<br>• **fprojectAdminPrivilege:** Perform administrative actions on the project.<br>• **fReadPrivilege**: Read the contents of the project.<br>• **fSearchPrivilege**: Search the contents of the project.<br>• **fSharePrivilege:** Not supported.<br>• **fWebDavPrivilege**: Not supported.<br>• **fAuditPrivilege**: View audit trial data for the project. |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema. These fields define the project configuration.

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## POST: Create OneDrive Project (createonedriveproject)

Create a project on a OneDrive site.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the project ID. This is only required when updating a OneDrive project with the PUT endpoint. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **ownerId** | Integer | Specify the ZLP user ID assigned to the user who should be the project owner. For policy resolution and ease of management purposes, the project will be associated with the department of the ZL UA user specified as the project owner. |
| **type** | Integer | Specify the project type. Enter 10 for OneDrive. |
| **name** | String | Specify the project's name. |
| **displayName** | String | Specify the project's display name. |
| **mailServerId** | Integer | Type the server ID assigned to the project's OneDrive server. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **domainId** | Integer | Specify the domain ID. |
| **crawlType** | Integer | Specify the crawl type:<br>• 400: Metadata Analysis (No Index),<br>• 200: Metadata Index + Content Analysis,<br>• 100: Metadata Index + Content Analysis + Content Index |

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| Schema Field | Type | Description |
|---|---|---|
| **scheduleStartDate**<br>**scheduleEndDate** | String | Specify the start and end dates during which disposition should be carried out upon the project. Use the following formats for dates:<br>YYYY-MM-DDTMM:HH:SS.SSZ<br>For example:<br>**2024-11-01T11:05:44.575Z**<br>This setting is applicable to projects where the Disposition Workflow is enabled, meaning that the **disposition_enabled** setting is set to True. In addition, scheduling for the Disposition Workflow must be enabled, meaning that the **fScheduleEnabled** setting is set to True. |
| **fScheduleEnabled** | Boolean | Specify whether disposition scheduling should be enabled for the project. This setting is applicable to projects where the disposition setting (**disposition_enabled**) is enabled. |
| **allowVersioning** | Boolean | Specify whether file versioning should be used in this project. This is not required for FAM projects. |

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| Schema Field | Type | Description |
|---|---|---|
| **flags** | Boolean | A set of Boolean values used to specify whether each project attribute should be enabled or not. Set to True to enable, or False to disable.<br>• **allowsAddition**: Allow new files to be added to the project during file crawls.<br>• **disable_acl_capture**: Disable the capture of ACL permissions for all folders and files in the project. In this case, the ZL File Connector will not check the ACL permissions while crawling.<br>• **add_users_based_folder_acl**: Any ZL UA user with at least 'Read' ACL privileges for a folder within the project will automatically have access to the folder in the project in the ZL File Archiving application.<br>• **fetch_file_acl**: Retrieve the ACL list for each file included in the project.<br>• **crawlfetchlatestver**: Retrieve the latest versions of previously added files during project crawls.<br>• **lock_crawl**: Disable future crawls of the project.<br>• **disable_full_crawl**: Indicate whether the entire project should be scanned (and subject to archiving) when it is crawled.<br>• **disposition_enabled**: Enable disposition on the project. Disposition is the process by which files whose records management lifecycle has expired are deleted and removed from the ZL UA system.<br>• **disposition_approval_required**: Require approval for Disposition Runs within the project. |

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| Schema Field | Type | Description |
|---|---|---|
| **folderRoot** | These fields are output fields are used to define the project's root folder. Input is not required here when using the endpoint. | |
| **dirId** | String | Input to these fields is not required. |
| **parentId** | Integer | |
| **name** | String | |
| **displayName** | String | |
| **description** | String | |
| **relativePath** | String | |
| **type** | Integer | |
| **storageSize** | Integer | |
| **itemCount** | Integer | |
| **deleted** | Boolean | This field is used for output purposes. Not required. |
| **dirSpec** | Specify which folders and sub-folders will be included in the project. Each entry in the `allEntry` array identifies a project folder and includes the following fields: | |
| **symbolicLink** | String | The path display name. |
| **rootPath** | String | Specify the root path of the folder. For example:<br>`C:\\Users\\bross\\Downloads\\fileset`<br>You could also specify the path as:<br>`C:/Users/bross/Downloads/fileset` |
| **exclusionPathSet** | String | Specify the relative paths of any sub-folders that should not be included when crawling the project. For example:<br>`C:\\Users\\adunna\\Downloads\\fam`<br>You could also specify the path as:<br>`C:/Users/adunna/Downloads/fam` |
| **treeCrawl** | Boolean | These fields are for output purposes. No input is required. |

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| Schema Field | Type | Description |
|---|---|---|
| **propertyMap** | String | |
| **privilegesSettings** | Boolean | A set of Boolean values used to specify the default permissions users should be granted for the project:<br>• **fprojectAdminPrivilege:** Perform administrative actions on the project.<br>• **fReadPrivilege**: Read the contents of the project.<br>• **fSearchPrivilege**: Search the contents of the project.<br>• **fSharePrivilege:** Not supported.<br>• **fWebDavPrivilege**: Not supported.<br>• **fAuditPrivilege**: View audit trial data for the project. |
| **crawlAllVersions** | Boolean | Set to True to archive all the versions of a file. If the check box is not selected, only the latest version of the file is crawled. |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema. These fields define the project configuration.

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## PUT: Update OneDrive Project (updateonedriveproject)

Update a OneDrive project's configuration.

### Request Parameters

None.

### Request Body Schema Fields

The schema fields required to update the OneDrive project's configuration are the same as those that must be specified when creating the project with the POST: Create OneDrive Project endpoint, as described in the previous section. You must also specify the ID of the project to be updated.

### Response Schema Fields

The schema fields returned for the project are the same as those required in the request schema when creating it with the POST: Create OneDrive Project endpoint, or when updating it using this endpoint. They represent the configuration of the project. For descriptions of these fields, refer to the previous section.

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## POST: Create File Share Project (createfileshareproject)

Create a project on a File Share server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the project ID. This is only required when updating a File Share project with the PUT endpoint. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **ownerId** | Integer | Specify the ZLP user ID assigned to the user who should be the project owner. For policy resolution and ease of management purposes, the project will be associated with the department of the ZL UA user specified as the project owner. |
| **type** | Integer | Specify the project type. Enter 1 for file share projects. |
| **name** | String | Specify the project's name. |
| **displayName** | String | Specify the project's display name. |
| **mailServerId** | Integer | Type the server ID assigned to the project's file server. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **domainId** | Integer | Specify the domain ID. |
| **crawlType** | Integer | Specify the crawl type:<br>• 400: Metadata Analysis (No Index)<br>• 200: Metadata Index + Content Analysis<br>• 100: Metadata Index + Content Analysis + Content Index |

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| Schema Field | Type | Description |
|---|---|---|
| **scheduleStartDate**<br>**scheduleEndDate** | String | Specify the start and end dates during which disposition should be carried out upon the project. Use the following formats for dates:<br>YYYY-MM-DDTMM:HH:SS.SSZ<br>For example:<br>**2024-11-01T11:05:44.575Z**<br>This setting is applicable to projects where the Disposition Workflow is enabled, meaning that the **disposition_enabled** setting is set to True. In addition, scheduling for the Disposition Workflow must be enabled, meaning that the **fScheduleEnabled** setting is set to True. |
| **fScheduleEnabled** | Boolean | Specify whether disposition scheduling should be enabled for the project. This setting is applicable to projects where the disposition setting (**disposition_enabled**) is enabled. |
| **allowVersioning** | Boolean | Specify whether file versioning should be used in this project. Input to this field is not required for FAM projects. |

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| Schema Field | Type | Description |
|---|---|---|
| **flags** | Boolean | A set of Boolean values used to specify whether each project attribute should be enabled or not. Set to True to enable, or False to disable.<br>• **allowsAddition**: Allow new files to be added to the project during file crawls.<br>• **disable_acl_capture**: Disable the capture of ACL permissions for all folders and files in the project. In this case, the ZL File Connector will not check the ACL permissions while crawling.<br>• **add_users_based_folder_acl**: Any ZL UA user with at least 'Read' ACL privileges for a folder within the project will automatically have access to the folder in the project in the ZL File Archiving application.<br>• **fetch_file_acl**: Retrieve the ACL list for each file included in the project.<br>• **crawlfetchlatestver**: Retrieve the latest versions of previously added files during project crawls.<br>• **lock_crawl**: Disable future crawls of the project.<br>• **disable_full_crawl**: Indicate whether the entire project should be scanned (and subject to archiving) when it is crawled.<br>• **disposition_enabled**: Enable disposition on the project. Disposition is the process by which files whose records management lifecycle has expired are deleted and removed from the ZL UA system.<br>• **disposition_approval_required**: Require approval for Disposition Runs within the project. |

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| Schema Field | Type | Description |
|---|---|---|
| **folderRoot** | These fields are output fields used define the project's root folder. Input is not required here when using the endpoint. | |
| **dirId** | Integer | Input to these fields is not required. |
| **parentId** | Integer | |
| **name** | String | |
| **displayName** | String | |
| **description** | String | |
| **relativePath** | String | |
| **folderType** | Integer | |
| **storageSize** | Integer | |
| **itemCount** | Integer | |
| **deleted** | Boolean | This field is used for output purposes. Not required. |
| **dirSpec** | Specify which folders and sub-folders will be included in the project. Each entry in the `allEntry` array identifies a project folder and includes the following fields: | |
| **symbolicLink** | String | The path display name. |
| **rootPath** | String | Specify the root path of the folder. For example:<br>`C:\\Users\\bross\\Downloads\\fileset`<br>You could also specify the path as:<br>`C:/Users/bross/Downloads/fileset` |
| **exclusionPathSet** | String | Specify the relative paths of any sub-folders that should not be included when crawling the project. For example:<br>`C:\\Users\\adunna\\Downloads\\fam`<br>You could also specify the path as:<br>`C:/Users/adunna/Downloads/fam` |

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| Schema Field | Type | Description |
|---|---|---|
| **treeCrawl** | Boolean | These fields are for output purposes. No input is required. |
| **propertyMap** | String | |
| **privilegesSettings** | Boolean | A set of Boolean values used to specify the default permissions users should be granted for the project:<br>• **fprojectAdminPrivilege:** Perform administrative actions on the project.<br>• **fReadPrivilege**: Read the contents of the project.<br>• **fSearchPrivilege**: Search the contents of the project.<br>• **fSharePrivilege**: Not supported.<br>• **fWebDavPrivilege**: Not supported.<br>• **fAuditPrivilege**: View audit trial data for the project. |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema. These fields define the project configuration.

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## PUT: Update File Share Project (updatefileshareproject)

Update a file share project's configuration.

### Request Parameters

None.

### Request Body Schema Fields

The schema fields required to update the file share project's configuration are the same as those that must be specified when creating the file project, as described in the previous section. You must also specify the ID of the project being updated.

### Response Schema Fields

The schema fields returned for the project are the same as those required in the request schema when creating it (or when updating it using this endpoint). They represent the configuration of the project. For descriptions of these fields, refer to the previous section.

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## POST: Create SharePoint Project (createsharepointproject)

Create a project on a SharePoint site.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the project ID. This is only required when updating a SharePoint project with the PUT endpoint. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **ownerId** | Integer | Specify the ZLP user ID assigned to the user who should be the project owner. For policy resolution and ease of management purposes, the project will be associated with the department of the ZL UA user specified as the project owner. |
| **type** | Integer | Specify the project type. Enter 3 for SharePoint. |
| **name** | String | Specify the project's name. |
| **displayName** | String | Specify the project's display name. |
| **mailServerId** | Integer | Type the server ID assigned to the project's server. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **domainId** | Integer | Specify the domain ID. |
| **crawlType** | Integer | Specify the crawl type:<br>• 400: Metadata Analysis (No Index),<br>• 200: Metadata Index + Content Analysis<br>• 100: Metadata Index + Content Analysis + Content Index |

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| Schema Field | Type | Description |
|---|---|---|
| **scheduleStartDate**<br>**scheduleEndDate** | String | Specify the start and end dates during which disposition should be carried out upon the project. Use the following formats for dates:<br>YYYY-MM-DDTMM:HH:SS.SSZ<br>For example:<br>**2024-11-01T11:05:44.575Z**<br>This setting is applicable to projects where the Disposition Workflow is enabled, meaning that the **disposition_enabled** setting is set to True. In addition, scheduling for the Disposition Workflow must be enabled, meaning that the **fScheduleEnabled** setting is set to True. |
| **fScheduleEnabled** | Boolean | Specify whether disposition scheduling should be enabled for the project. This setting is applicable to projects where the disposition setting (**disposition_enabled**) is enabled. |
| **allowVersioning** | Boolean | Specify whether file versioning should be used in this project. Input to this field is not required for FAM projects. |

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| Schema Field | Type | Description |
|---|---|---|
| **flags** | Boolean | A set of Boolean values used to specify whether each project attribute should be enabled or not. Set to True to enable, or False to disable.<br>• **allowsAddition**: Allow new files to be added to the project during file crawls.<br>• **disable_acl_capture**: Disable the capture of ACL permissions for all folders and files in the project. In this case, the ZL File Connector will not check the ACL permissions while crawling.<br>• **add_users_based_folder_acl**: Any ZL UA user with at least 'Read' ACL privileges for a folder within the project will automatically have access to the folder in the project in the ZL File Archiving application.<br>• **fetch_file_acl**: Retrieve the ACL list for each file included in the project.<br>• **crawlfetchlatestver**: Retrieve the latest versions of previously added files during project crawls.<br>• **lock_crawl**: Disable future crawls of the project.<br>• **disable_full_crawl**: Indicate whether the entire project should be scanned (and subject to archiving) when it is crawled.<br>• **disposition_enabled**: Enable disposition on the project. Disposition is the process by which files whose records management lifecycle has expired are deleted and removed from the ZL UA system.<br>• **disposition_approval_required**: Require approval for Disposition Runs within the project. |

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| Schema Field | Type | Description |
|---|---|---|
| **folderRoot** | These fields are output fields used define the project's root folder. Input is not required here when using the endpoint. | |
| **dirId** | Integer | Input to these fields is not required. |
| **parentId** | Integer | |
| **name** | String | |
| **displayName** | String | |
| **description** | String | |
| **relativePath** | String | |
| **type** | Integer | |
| **storageSize** | Integer | |
| **itemCount** | Integer | |
| **deleted** | Boolean | This field is used for output purposes. Not required. |
| **dirSpec** | Specify which folders and sub-folders will be included in the project. Each entry in the `allEntry` array identifies a project folder and includes the following fields: | |
| **symbolicLink** | String | The path display name. |
| **rootPath** | String | Specify the root path of the folder. For example:<br>`C:\\Users\\bross\\Downloads\\fileset`<br>You could also specify the path as:<br>`C:/Users/bross/Downloads/fileset` |
| **exclusionPathSet** | String | Specify the relative paths of any sub-folders that should not be included when crawling the project. For example:<br>`C:\\Users\\adunna\\Downloads\\fam`<br>You could also specify the path as:<br>`C:/Users/adunna/Downloads/fam` |

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| Schema Field | Type | Description |
|---|---|---|
| **treeCrawl** | Boolean | These fields are for output purposes. No input is required. |
| **propertyMap** | String | |
| **privilegesSettings** | Boolean | A set of Boolean values used to specify the default permissions users should be granted for the project:<br>• **fprojectAdminPrivilege:** Perform administrative actions on the project.<br>• **fReadPrivilege**: Read the contents of the project.<br>• **fSearchPrivilege**: Search the contents of the project.<br>• **fSharePrivilege, fWebDavPrivilege**: Not supported. Leave at default values.<br>• **fAuditPrivilege**: View audit trial data for the project. |
| **siteTitle** | String | Type the site title. |
| **siteURL** | String | Type the SharePoint site URL. |
| **guid** | String | Type the SharePoint site GUID. Refer to the *SharePoint Archiving Administrator's Guide* for instructions to follow when retrieving SharePoint site GUID values. |
| **username** | String | When using the SharePoint Connector for on-premise SharePoint installations, type the user ID of a site collection administrator who has access to the site URL.<br>When using the SharePoint Online CSOM Connector, ensure that you append "o365:" to the user ID/name. For example, if the username is **john@demo.onmicrosoft.com**, then you would specify the value in this field as **o365:john@demo.onmicrosoft.com.** |
| **password** | String | When using either SharePoint Online Connector, type the password of the user whose ID was specified for the **username** field. |
| **spServerAPI** | Boolean | Set to True to use the server API rather than the web services API. When this option is True, the **username** and **password** fields are not applicable.<br>When using the Cloud SharePoint Connector to archive the project files, leave this check box unselected. |

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| Schema Field | Type | Description |
|---|---|---|
| **skipHidden** | Boolean | Set to True to skip archiving lists that are hidden in SharePoint. |
| **crawlAllVersions** | Boolean | Set to True to archive all the versions of a file. If the check box is not selected, only the latest version of the file is crawled. |
| **inclusive**<br>**exclusive** | String | Use these fields to specify any SharePoint sites/directories that should (inclusive) or should not (exclusive) be crawled when the project is scanned. Specify them as a comma-separated list.<br>Within the inclusion and exclusion filters there are two different settings:<br>• **T**: Indicates the List Type. For example, Document Library, Announcements, Events, Calendar etc. Syntax: T:DocumentLibrary<br>• **L**: Indicates the various names of the type of the Lists. For ex: Shared Documents and Site Assets are lists under Document Library. Syntax: L:Shared Documents, L:Lists/WORMProject<br>Home/L:Lists/Delegation Agreement; where Delegation Agreement is the name of the list.<br>For some lists, the name is prefixed with 'List/'. You must check the URL before including it in the necessary fields.<br>**Exclusion/Inclusion Parameter Syntax**<br>• All document libraries:<br>T:DocumentLibrary<br>• Specific Document Libraries:<br>Home/regulatory/L:Registration Reports<br>Home/L:WORMProject<br>Home/regulatory/L:DomFilings; where regulatory is a sub-site of Home.<br>• Separate libraries with a semi-colon and no spaces:<br>Home/L:WORMProject;Home/regulatory/L:DomFilings<br>Please note that Exclusion takes a precedence over inclusions. For example, if you have specified inclusion parameters as *Home/regulatory/L:Test* and exclusion parameter as: *Home/regulatory*, "regulatory" will not be crawled. |

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### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema. These fields define the project configuration.

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## PUT: Update SharePoint Project (updatesharepointproject)

Update a SharePoint project's configuration.

### Request Parameters

None.

### Request Body Schema Fields

The schema fields required to update the SharePoint project's configuration are the same as those that must be specified when creating the project with the POST: Create SharePoint Project endpoint, as described in the previous section. You must also specify the ID of the project to be updated.

### Response Schema Fields

The schema fields returned for the project are the same as those required in the request schema when creating it with the POST: Create SharePoint Project endpoint (or when updating it using this endpoint). They represent the configuration of the project. For descriptions of these fields, refer to the previous section.

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## POST: Create Box Project (createBoxProject)

Create a Box project.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the project ID. This is only required when updating a Box project with the PUT endpoint. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **ownerId** | Integer | Specify the ZLP user ID assigned to the project owner. For policy resolution and ease of management purposes, the project will be associated with the department of the ZL UA user specified as the project owner. |
| **type** | Integer | Specify the project type. Enter 9 for Box projects. |
| **name** | String | Specify the project's name. |
| **displayName** | String | Specify the project's display name. |
| **mailServerId** | Integer | Specify the server ID assigned to the project's server. You can acquire server IDs with the You can obtain server IDs with the GET: Get All Mail Severs endpoint. For more information, refer to the *ZL UA Rest API Kit Reference Guide*. |
| **domainId** | Integer | Not required. |
| **crawlType** | Integer | Specify the crawl type:<br>• 400: Metadata Analysis (No Index),<br>• 200: Metadata Index + Content Analysis,<br>• 100: Metadata Index + Content Analysis + Content Index |

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| Schema Field | Type | Description |
|---|---|---|
| **scheduleStartDate**<br>**scheduleEndDate** | String | Specify the start and end dates during which disposition should be carried out upon the project. Use the following formats for dates:<br>YYYY-MM-DDTMM:HH:SS.SSZ<br>For example:<br>**2024-11-01T11:05:44.575Z**<br>This setting is applicable to projects where the Disposition Workflow is enabled, meaning that the **disposition_enabled** setting is set to True. In addition, scheduling for the Disposition Workflow must be enabled, meaning that the **fScheduleEnabled** setting is set to True. |
| **fScheduleEnabled** | Boolean | Specify whether disposition scheduling should be enabled for the project. This setting is applicable to projects where the disposition setting (**disposition_enabled**) is enabled. |
| **allowVersioning** | Boolean | Specify whether file versioning should be used in this project. Input to this field is not required for FAM projects. |

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| Schema Field | Type | Description |
|---|---|---|
| **flags** | Boolean | A set of Boolean values used to specify whether each project attribute should be enabled or not. Set to True to enable, or False to disable.<br>• **allowsAddition**: Allow new files to be added to the project during file crawls.<br>• **disable_acl_capture**: Disable the capture of ACL permissions for all folders and files in the project. In this case, the ZL File Connector will not check the ACL permissions while crawling.<br>• **add_users_based_folder_acl**: Any ZL UA user with at least 'Read' ACL privileges for a folder within the project will automatically have access to the folder in the project in the ZL File Archiving application.<br>• **fetch_file_acl**: Retrieve the ACL list for each file included in the project.<br>• **crawlfetchlatestver**: Retrieve the latest versions of previously added files during project crawls.<br>• **lock_crawl**: Disable future crawls of the project.<br>• **disable_full_crawl**: Indicate whether the entire project should be scanned (and subject to archiving) when it is crawled.<br>• **disposition_enabled**: Enable disposition on the project. Disposition is the process by which files whose records management lifecycle has expired are deleted and removed from the ZL UA system.<br>• **disposition_approval_required**: Require approval for Disposition Runs within the project. |
| **folderRoot** | Array | These fields are output fields used to define the project's root folder. Input is not required here when using the endpoint. |
| **deleted** | Boolean | This field is used for output purposes. Not required. |
| **dirSpec** | Specify which folders and sub-folders will be included in the project. Each entry in the `allEntry` array identifies a project folder and includes the following fields: | |
| **symbolicLink** | String | The path display name. |

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| Schema Field | Type | Description |
|---|---|---|
| **rootPath** | String | Specify the root path of the folder. For example:<br>`C:\\Users\\bross\\Downloads\\fileset`<br>You could also specify the path as:<br>`C:/Users/bross/Downloads/fileset` |
| **exclusionPathSet** | String | Specify the relative paths of any sub-folders that should not be included when crawling the project. For example:<br>`C:\\Users\\adunna\\Downloads\\fam`<br>You could also specify the path as:<br>`C:/Users/adunna/Downloads/fam` |
| **treeCrawl** | Boolean | These fields are for output purposes. No input is required. |
| **propertyMap** | String | |
| **privilegesSettings** | Boolean | A set of Boolean values used to specify the default permissions users should be granted for the project:<br>• **fprojectAdminPrivilege:** Perform administrative actions on the project.<br>• **fReadPrivilege**: Read the contents of the project.<br>• **fSearchPrivilege**: Search the contents of the project.<br>• **fSharePrivilege**: Not supported.<br>• **fWebDavPrivilege**: Not supported.<br>• **fAuditPrivilege**: View audit trial data for the project. |
| **userId** | Integer | Specify the user ID assigned to the Box project owner. |
| **username** | String | Specify the user name of the Box project owner. |
| **emailId** | String | Specify the email address of the Box project owner. |

### Response Schema Fields

The fields included in the response schema are the same set of fields required in the request schema, as well as the ID that has been assigned to the Box project. These fields define the project configuration.

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## PUT: Update Box Project (updateBoxProject)

Update a Box project's configuration.

### Request Parameters

None.

### Request Body Schema Fields

The schema fields required to update the Box project's configuration are the same as those that must be specified when creating the project, as described in *POST: Create Box Project* on page 364. You must also specify an ID value to identify the Box project being updated.

### Response Schema Fields

The schema fields returned for the project are the same as those required in the request schema when creating it (or when updating it using this endpoint). They represent the configuration of the project. For descriptions of these fields, refer to *POST: Create Box Project* on page 364.

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## DELETE: Remove Project (deleteusingid)

Delete a project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project to be deleted. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the project was deleted successfully.

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## GET: Get All Projects (getallprojects)

Retrieve a list of all the projects on the server.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Project Entries:** Includes an entry for each project found on the server. The fields included for each project are the same as those required in the request schema when creating the project. They represent the configuration of the project. For descriptions of these fields, refer to the following sections:<br>• **Google Drive Projects**: *POST: Create Google Drive Project (creategoogledriveproject)* on page 339<br>• **OneDrive Projects**: *POST: Create OneDrive Project (createonedriveproject)* on page 344<br>• **File Share Projects**: *POST: Create File Share Project (create)* on page 350<br>• **SharePoint Projects:** *POST: Create SharePoint Project* on page 356<br>• **Box Projects:** *POST: Create Box Project (createBoxProject)* on page 364 | | |

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## GET: Get Sub-Folders (subfolders)

Retrieve a list of sub-folders for a parent folder.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projId** | Integer | Specify the ID of the project to be viewed. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |
| **parent** | Integer | Specify the parent folder ID. Specify -1 for the root folder. The response schema returned by this call includes information for each sub-folder beneath the parent folder. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Folders:** Includes an entry for each sub-folder that is found. The following fields are included for each entry: | | |
| **dirId** | Integer | The folder ID. |
| **parentID** | Integer | The ID of the parent folder. |
| **name** | String | Folder name. |
| **displayName** | String | The folder display name. |
| **description** | String | Description. |
| **relativePath** | String | The relative path of the folder. |

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| Schema Field | Type | Description |
|---|---|---|
| **type** | Integer | The project type:<br>• 1: File Share<br>• 3: SharePoint<br>• 7: Google Drive<br>• 9: Box<br>• 10: OneDrive |
| **storageSize** | Integer | The folder storage size, in bytes. |
| **itemCount** | Integer | The number of items contained within the folder. |

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## GET: Get Project Info by ID (getprojectusingid)

Retrieve a project's configuration. Specify the project by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | The ID of the project to be viewed. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |

### Request Body Schema Fields

None.

### Response Schema Fields

The schema fields returned for the project are the same as those required in the request schema when creating the project. They represent the configuration of the project. For descriptions of these fields, refer to the following sections:

- **Google Drive Projects**: *POST: Create Google Drive Project (creategoogledriveproject)* on page 339
- **OneDrive Projects**: *POST: Create OneDrive Project (createonedriveproject)* on page 344344
- **File Share Projects**: *POST: Create File Share Project (create)* on page 350
- **SharePoint Projects:** *POST: Create SharePoint Project* on page 356
- **Box Projects:** *POST: Create Box Project (createBoxProject)* on page 364

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## GET: Get Project Info by Name (getprojectusingname)

Retrieve project's configuration. Specify the project by its name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectName** | String | Specify the name of the project to be viewed. The REST API includes several endpoints you can use to retrieve project names. For example, you could use the GET: Get All Projects endpoint to retrieve the names of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |

### Request Body Schema Fields

None.

### Response Schema Fields

The schema fields returned for the project are the same as those required in the request schema when creating the project. They represent the configuration of the project. For descriptions of these fields, refer to the following sections:

- **Google Drive Projects**: *POST: Create Google Drive Project (creategoogledriveproject)* on page 339
- **OneDrive Projects**: *POST: Create OneDrive Project (createonedriveproject)* on page 344344
- **File Share Projects**: *POST: Create File Share Project (create)* on page 350
- **SharePoint Projects:** *POST: Create SharePoint Project* on page 356
- **Box Projects:** *POST: Create Box Project (createBoxProject)* on page 364

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## GET: Get Projects of File Server (getprojectsusingidfileserver)

Retrieve a list of projects that have been created on a given file share server, OneDrive server, SharePoint, GoogleDrive or Box server.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **fileServerId** | Integer | The ID of the file server to be viewed. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None

### Response Schema Fields

The response includes an entry for each project found on the server. The schema fields included in each entry are the same as those required in the request schema when creating it. They represent the configuration of the project. For descriptions of these fields, refer to the following sections:

- **Google Drive Projects**: *POST: Create Google Drive Project (creategoogledriveproject)* on page 339
- **OneDrive Projects**: *POST: Create OneDrive Project (createonedriveproject)* on page 344344
- **File Share Projects**: *POST: Create File Share Project (create)* on page 350
- **SharePoint Projects:** *POST: Create SharePoint Project* on page 356
- **Box Projects:** *POST: Create Box Project (createBoxProject)* on page 364

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## GET: Get Projects Using Search (getprojectusingpatternsearch)

Retrieve a project by searching for a specific project name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **pattern** | Integer | Enter the search pattern. The search will return projects whose name includes or is similar to the search pattern. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

The schema fields returned for the project are the same as those required in the request schema when creating the project. They represent the configuration of the project. For descriptions of these fields, refer to the following sections:

- **Google Drive Projects**: *POST: Create Google Drive Project (creategoogledriveproject)* on page 339
- **OneDrive Projects**: *POST: Create OneDrive Project (createonedriveproject)* on page 344344
- **File Share Projects**: *POST: Create File Share Project (create)* on page 350
- **SharePoint Projects:** *POST: Create SharePoint Project* on page 356
- **Box Projects:** *POST: Create Box Project (createBoxProject)* on page 364

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## POST: Make Directory Spec (makeDirectorySpec)

Create a directory specification for a File Share project. You can use this as input to the POST: Create File Share Project endpoint when creating a File Share project that includes multiple entries.

### Request Parameters

None.

### Request Body Schema Fields

| Schema FIeld | Type | Description |
|---|---|---|
| **dirSpec** | Specify which directory specifications will be created. Each entry in the `allEntry` array identifies a project folder and includes the following fields: | |
| **symbolicLink** | String | The path display name. |
| **rootPath** | String | Specify the root path of the folder. For example:<br>`C:\\Users\\bross\\Downloads\\fileset`<br>You could also specify the path as:<br>`C:/Users/bross/Downloads/fileset` |
| **exclusionPathSet** | String | Specify the relative paths of any sub-folders that should not be included when crawling the project. For example:<br>`C:\\Users\\adunna\\Downloads\\fam`<br>You could also specify the path as:<br>`C:/Users/adunna/Downloads/fam` |
| **treeCrawl** | Boolean | These fields are for output purposes. No input is required. |
| **propertyMap** | String | |

### Response Schema Fields

The schema fields returned for the directory specification are the same as those required in the request schema when creating it. They represent the configuration of the directory specification.

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## POST: Crawl Project (runcrawl)

Run a full scan upon a project. This scans the server for any changes that have been made to previously ingested files and makes the necessary changes in ZL UA. This also identifies, captures, and acts on any new files on the server or any old files that are ready to be archived from the server.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project to be crawled. The REST API includes several endpoints you can use to retrieve project ID values. For example, you could use the GET: Get All Projects endpoint to retrieve the ID values of all projects defined on your system. For more information refer to GET: *Get All Projects (getallprojects)* on page 370. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the crawl has been started successfully. The string also includes a task ID value you can use to check the status of the crawl with the GET: Get Task Status endpoint. For more information, refer to *GET: Get Task Status* on page 379.

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## GET: Get Task Status (gettaskstatus)

Obtain the current status of a project crawl or Disposition Run.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **stKey** | String | Enter the task ID value for the task you want to view. The task ID is returned when you start the task (i.e., when you crawl a project with the POST: Run Crawl endpoint or start a Disposition Run with the POST: Start Disposition Run endpoint).<br><br>For more information, refer to *POST: Crawl Project* on page 378 or *POST: Start Disposition Run* on page 192. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **key** | String | The task key. |
| **taskName** | String | The task name. |
| **startTime**<br>**endTime** | Integer | The time that the task started and ended. These times are delivered as epoch timestamps. For more information on epoch timestamps, refer to:<br><br>https://www.epochconverter.com/ |
| **elapsedTime** | Integer | The amount of time the task has taken, in milliseconds. |
| **taskSuccess** | Boolean | Set to True if the task has completed successfully. |
| **taskMessage** | String | A message describing the current status of the task. |
| **taskErrorMessage** | String | A message describing any error conditions which occurred. |
| **known** | Boolean | Indicates whether it is a known task (True) or not (False). |
| **pid** | String | The process ID assigned to the task. |

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## GET: Get Previous Task Status (getprevioustaskstatus)

Obtain the status of a task that was previously run upon a project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project to be viewed. The REST API includes several endpoints that you can use to retrieve the configurations and ID values of your projects. Options are provided to retrieve project configurations by ID, name pattern searches, file server ID, and more.<br>For further details on these endpoints, refer to the *UAA Projects* section of the *ZL UA REST API Reference Guide*. |
| **stTask** | String | Select the task you want to view (**ProjectArchiveTask** for crawling operations or **InPlaceFileDisposition** for disposition-related tasks). |

### Request Body Schema Fields

None.

### Response Schema Fields

The endpoint returns an entry for each task that has been executed upon the project. Each entry includes the following fields.

| Schema Field | Type | Description |
|---|---|---|
| **pid** | String | The process ID assigned to the task. |
| **endDate** | String | The date and time that the task completed. |
| **name** | String | The name of the task. |
| **paramMap** | String | Additional information about the task, such as its current status. |
| **stId** | String | The unique ID assigned to the task. |
| **startDate** | String | The date and time that the task began. |
| **status** | String | The status of the task. |
| **zlpUserId** | Integer | The ID of the ZL user that initiated the task. |

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## PUT: Update Crawl Type (updatecrawltype)

Update the crawl type (i.e., scan type) that has been assigned to a project and run a partial scan on the project. This determines what data will be ingested for each file (i.e., metadata and/or content) and whether are not the data will be indexed and searchable. Several options are presented for scanning:

- **Metadata Analysis (No Index):** Ingest file metadata without indexing. Search functionality and static tag assignment are not available for this crawl type.
- **Metadata Index + Content Analysis:** Indexes all metadata and all contents without indexing. Search functionality is only available for metadata for this crawl type. All tagging options are supported.
- **Metadata Analysis + Content Analysis + Content Index:** Ingest all file metadata and contents with indexing. Search functionality is available for both metadata and content for this crawl type. All tagging options are supported.

Please take note of the following:

- Before the project has been crawled, you can change the crawl type any number of times and to any desired setting.
- After the project has been initially crawled, you can only change the crawl type once. The following transitions are supported:

  **Metadata Analysis (No Index) → Metadata Index + Content Analysis**
  **Metadata Analysis (No Index) → Metadata Analysis + Content Analysis + Content Index**

  You cannot change the crawl type while some operations (e.g., a project crawl or Disposition Run) are ongoing.

### Request Parameters

None.

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### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project to be updated. The REST API includes several endpoints that you can use to retrieve the configurations and ID values of your projects. Options are provided to retrieve project configurations by ID, name pattern searches, file server ID, and more.<br><br>For further details on these endpoints, refer to the *UAA Projects* section of the *ZL UA REST API Reference Guide*. |
| **scanType** | Integer | Specify the scan type (i.e., crawl type) to assign to the project:<br><br>**400**: Metadata Analysis (No Index)<br>**200**: Metadata Index + Content Analysis<br>**100**: Metadata Analysis + Content Analysis + Content Index<br><br>Please remember that the following transitions are supported, and that a project's crawl type can only be updated once after it is initially created:<br><br>• **Metadata Analysis (No Index) → Metadata Index + Content Analysis**<br>• **Metadata Analysis (No Index) → Metadata Analysis + Content Analysis + Content Index** |

### Response Schema Fields

The endpoint returns the project ID and scan type assigned to the project.

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# UAA/Roles

An application or department-level set of permissions that determines what users can access and what actions users can perform in the application.

Roles can be assigned globally, or for a specific department(s). For example, a Global Discovery Manager role would enable the user's assigned role for all cases. A Discover Manager role for a specific department would restrict the user's role to the cases defined within that department. A case's department can be defined during case setup.

The following sections describe the UAA/Roles endpoints available in the REST API. You can use these endpoints to grant and revoke roles within the UAA module and ZL UA:

- *GET: Get All Custom Roles (getallcustomroles):* Retrieve a list of custom roles that have been added to the system.
- *GET: Get All System Roles (getallsystemroles):* Retrieve a list of system roles that are included in the system.
- *GET: Get User Roles (getroleofuser):* Retrieve a list of the roles that have been assigned to a user.
- *PUT: Grant User Roles (grantroles):* Grant roles to a user.
- *PUT: Revoke User Roles (revokeroles):* Revoke roles from a user.

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## GET: Get All Custom Roles (getallcustomroles)

Retrieve a list of all custom roles in the system. A custom role is a combination of different ZL system roles.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Roles:** Includes an entry for each custom role in the system. The following fields are included in each entry: | | |
| **roleId** | Integer | The role ID. |
| **displayName** | String | The role's display name. |
| **description** | Strinf | A description of the role. |
| **fSystemRole** | Boolean | Indicates whether the role is a system role (True) or not. |
| **appId** | Integer | The application ID assigned to the custom role. For custom roles, the application is primarily an organizational feature. The application you choose determines the application role group in which the custom role will be included. |
| **auditRecordLevel** | Integer | The audit trail record value that will be recorded when a user with this role performs an action. |
| **auditClearanceLevel** | Integer | The minimum value that the role should have to view actions recorded by other roles. |
| **allGrantableRolesIds** | Integer | The IDs of the roles that users assigned this custom role can grant to other users. |
| **allOperationNames** | String | A list of strings identifying the operations allowed by the custom role. |
| **systemRoleIds** | Integer | A list of integer ID values identifying the system roles included in the custom role. |

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## GET: Get All System Roles (getallsystemroles)

Retrieve a list of all system roles. The schema fields include in the response includes the ID and display names of all system roles, as well as information identifying the operations allowed by each role.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Roles:** Includes an entry for each system role. The following fields are included in each entry: | | |
| **roleId** | Integer | The role ID. |
| **displayName** | String | The role's display name. |
| **description** | Strinf | A description of the role. |
| **fSystemRole** | Boolean | Indicates whether the role is a system role (True) or not. |
| **appId** | Integer | The application ID assigned to the system role. |
| **auditRecordLevel** | Integer | The audit trail record value that will be recorded when a user with this role performs an action. |
| **auditClearanceLevel** | Integer | The minimum value that the role should have to view actions recorded by other roles. |
| **allGrantableRolesIds** | Integer | The IDs of the roles that users assigned this custom role can grant to other users. |
| **allOperationNames** | String | A list of strings identifying the operations allowed by the custom role. |
| **systemRoleIds** | Integer | A list of integer ID values identifying the other system roles included in this role. |

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## GET: Get User Roles (getroleofuser)

Retrieve a list of the roles assigned to a user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | The ZLP user ID assigned to the user whose roles you want to view. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **User Roles:** Includes an entry for each role that has been assigned to the user. The following fields are included in each entry: | | |
| **roleId** | Integer | The role ID. |
| **scope** | String | The scope of the role. A role can be granted globally so that it is applicable to all departments, or it can be granted to specific departments only:<br>• **Global**: Global<br>• **InclRecur**: On selected departments recursively<br>• **Incl**: On selected departments only |
| **allScopeDomainIDs** | Integer | Specifies the domain IDs of the departments the role is applicable to for roles that are only granted on selected departments. These are retrieved from the ArchiveServer Department Table. |

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## PUT: Grant User Roles (grantroles)

Grant roles to a user.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to grant roles to. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **User Roles:** The remaining input is an array of fields defining the roles to be granted. Specify the following for each **userRole** entry: | | |
| **roleId** | Integer | The role ID. For information on obtaining role IDs, refer to the following sections:<br>• *GET: Get All Custom Roles* on page 384<br>• *GET: Get All System Roles* on page 386 |
| **scope** | String | Specify whether the role should be granted globally so that it is applicable to all departments, or if it should be granted to specific departments only:<br>• **Global**: Global<br>• **InclRecur**: On selected departments recursively<br>• **Incl**: On selected departments only |
| **allScopeDomainIds** | Integer | An array of domain IDs to specify the departments the role is applicable to for roles that are only granted on selected departments. These can be retrieved from the ArchiveServer Department Table.<br>Specify the domain IDs as a comma-separated list. For example:<br>`"AllScopeDomainIds": [ 0,1,2,3 ]` |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **additionalProp:** Includes the following fields for each role specified in the request. | | |
| **success** | Boolean | Indicates whether the role was granted successfully (True) or not (False). |
| **result** | String | The result of the request. The string will indicate how the role has been applied (on which departments, scope, role ID, etc). |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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## PUT: Revoke User Roles (revokeroles)

Revoke roles that have been previously assigned to a user.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to modify. The REST API includes several endpoints you can use to retrieve user configuration data such as the ZLP user ID. For more information, refer to *UAA/Users* on page 452. |
| **roles** | Integer | An array of role IDs to specify the roles to be revoked. Specify the role IDs as a comma-separated list. For example:<br>`"Roles": [ 0,1,2,3 ]`<br>For information on obtaining role IDs, refer to the following sections:<br>• *GET: Get All Custom Roles* on page 384<br>• *GET: Get All System Roles* on page 386 |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **additionalProp:** Includes the following fields for each role specified in the request. | | |
| **success** | Boolean | Indicates whether the role was revoked successfully (True) or not (False). |
| **result** | String | The result of the request. If successful, a message will display indicating that the role has been revoked. |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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# FAM/Security Groups

A security group represents a specific group of users in ZL UA. When you assign project privileges to a security group, those privileges are granted to all users in the security group. The following sections describe the FAM/Security Groups endpoints available in the REST API. You can use these endpoints to create and manage security groups:

- *PUT: Ensure Security Group (ensuresecuritygroup):* Create a security group.
- *GET: Get All Security Groups (getallsecuritygroups):* Retrieve a list of the security groups that have been added to the system.
- *PUT: Remove Security Group (removesecuritygroup):* Remove a security group.

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## PUT: Ensure Security Group (ensuresecuritygroup)

Create a security group.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **aIdZlpUser** | Integer | An array of ZLP user IDs to specify the users who should be added to the security group. Specify the user IDs as a comma-separated list. For example:<br>`"aIdzlpUser": [ 0,1,2,3 ]` |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **additionalProp:** Includes the following fields for each user specified in the request. | | |
| **success** | Boolean | Indicates whether the users were added successfully (True) or not (False). |
| **result** | String | The result of the request. If **Success** is True, then this contains information regarding the security group. |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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## GET: Get All Security Groups (getallsecuritygroups)

Retrieve a list of all security groups.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br><br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Security Groups:** Includes an entry for each user added to the security group. The response schema fields included in each entry are the same as those included in the response returned after creating the security group. For descriptions of these fields, refer to *POST: Create User* on page 455. | | |

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## PUT: Remove Security Group (removesecuritygroup)

Remove a security group.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **aIdZlpUser** | Integer | An array of ZLP user IDs to specify the security groups to be removed. Specify the security group IDs as a comma-separated list. For example:<br>`"aIdzlpUser": [ 0,1,2,3 ]` |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **additionalProp:** Includes the following fields for each security group specified in the request. | | |
| **success** | Boolean | Indicates whether the security group was removed successfully (True) or not (False). |
| **result** | String | The result of the request. If **Success** is set to True, this will indicate that the security group was removed successfully. |
| **error** | If errors occurred, the **message** and **exception** strings provide information describing them. | |

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# UAA/Agents

Server agents are components that perform various tasks on the server, such as crawling a mail server for mailbox data, archiving a file server or performing user synchronization. Generally, each server added to ZL UA must have at least one server agent. The following sections describe the UAA/Agents endpoints available in the REST API:

- *POST: Create A Lotus Domino Journal Server Agent (createlotusjournalagent):* Create a Journal server agent for a Lotus Domino server.
- *POST: Create Lotus Domino Mailbox Crawl Server Agent (createlotusmailboxcrawlagent):* Create a Mailbox Crawl agent for a Lotus Domino server.
- *POST: Create a Server Agent (createserveragent):* Create a File Archive server or a Mailbox Crawl agent. These agents can be used with multiple server types, as specified later.
- *POST: Create a User Synchronization Mail Server Agent (createusersyncserveragent):* Create a User Synchronization server agent for a Microsoft Exchange, Microsoft EWS or Google Mail Server.
- *DELETE: Delete a Server Agent (deleteserveragent):* Delete a server agent.
- *GET: Get Server Agent Using Function (getagentusingfunction):* Retrieve the configuration of a server agent.
- *GET: Get Server Agent Using Name (getagentusingname):* Retrieve the configuration of a server agent.
- *GET: Get All Agents of Mail Server (getagentusingidmailserver)*: Retrieve the configurations of the server agents that have been added to a specific server.
- *PUT: Update A Lotus Domino Journal Server Agent (updatelotusjournalagent):* Update the configuration of a Journal agent that has been added to a Lotus Domino server.
- *PUT: Update Lotus Domino Mailbox Crawl Server Agent (updatelotusmailboxcrawlagent)*: Update the configuration of a Mailbox Crawl agent that has been added to a Lotus Domino server.
- *PUT: Update a Server Agent (updateserveragent)*: Update the configuration of a File Archive server or a Mailbox Crawl agent. These agents can be used with multiple server types, as specified later.
- *PUT: Update a User Synchronization Mail Server Agent (updateusersyncserveragent):* Update the configuration of a User Synchronization server agent for a Microsoft Exchange, Microsoft EWS or Google Mail Server.

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## POST: Create A Lotus Domino Journal Server Agent (createlotusjournalagent)

Create a Journal server agent for a Lotus Domino mail server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | Enter the server agent's name. |
| **agentType** | String | Specify **lotusJournal** as the server agent type. |
| **mask** | Integer | Specify the desired mask number. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | Set to True to designate that the agent should inherit the default run interval time. Set to False to specify a custom run interval time for the server agent with the **runInterval** field. |
| **runInterval** | Integer | If **useSystemDefault** is set to False, specify the custom run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | Specify the ID of the Louts Domino server the agent will run on. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **lotusJournalDbName** | String | Specify a name for the Lotus database journal instance. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |

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| Schema Field | Type | Description |
|---|---|---|
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination. |
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## POST: Create Lotus Domino Mailbox Crawl Server Agent (createlotusmailboxcrawlagent)

Create a Mailbox Crawl server agent for a Lotus Domino mail server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | Enter the server agent's name. |
| **agentType** | String | Specify **mbCrawl** as the server agent type. |
| **mask** | Integer | Specify the desired mask number. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | Set to True to designate that the agent should inherit the default run interval time. Set to False to specify a custom run interval time for the server agent with the **runInterval** field. |
| **runInterval** | Integer | If **useSystemDefault** is set to False, specify the custom run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | Specify the ID of the Louts Domino server the agent will run on. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **scanChildServers** | Boolean | Set to True if this Domino server is a parent server whose child servers should be scanned as well. |
| **threadLimit** | Integer | Specify the number of threads the agent should be able to use during the crawling process. This is only applicable if the **scanChildServers** setting is set to True. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination. |
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## POST: Create a Server Agent (createserveragent)

Create a server agent for the following purposes:

- **File Archive:** Any agent to archive files from any of the following server types: File Share, SharePoint, Google Drive and OneDrive.
- **Mailbox Crawl:** Any agent to crawl mailboxes for any of the following server types: Google Mail, Microsoft Exchange and Microsoft EWS.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | Enter the server agent's name. |
| **agentType** | String | Specify the server agent type:<br>• For a file share archiving agent, enter **file**.<br>• For a SharePoint archiving agent, enter **sharepointFile**.<br>• For a GoogleDrive archiving agent, enter **gdDriveFile**.<br>• For a OneDrive archiving agent, enter **onedriveFile**.<br>• For an agent to crawl mailboxes for Google Mail, Microsoft Exchange and Microsoft EWS servers, enter **mbCrawl**. |
| **mask** | Integer | Specify the desired mask number. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | Set to True to designate that the agent should inherit the default run interval time. Set to False to specify a custom run interval time for the server agent with the **runInterval** field. |
| **runInterval** | Integer | If **useSystemDefault** is set to False, specify the custom run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | Specify the ID of the server the agent will run on. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination. |
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## POST: Create a User Synchronization Mail Server Agent (createusersyncserveragent)

Create a User Synchronization server agent for a Microsoft Exchange, Microsoft EWS or Google Mail Server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | Enter the server agent's name. |
| **agentType** | String | Specify the server agent type:<br>• For user synchronization on a Microsoft Exchange server, enter **exchangeUserSync**.<br>• For user synchronization on a Microsoft EWS server, enter **ewsUserSync**<br>• For user synchronization on a Google Mail server, enter **googleUserSync** |
| **defaultDepartment** | Integer | Specify the ID of the default department to assign users to during user synchronization. The UAA/Departments endpoints provide several ways to retrieve department IDs. For more information, refer to *UAA/Departments* on page 97. |
| **autoCreate** | Boolean | Set to True to create user accounts for any new users found during synchronization. |
| **autoTerminate** | Boolean | Set to True to automatically terminate users during synchronization if necessary. This may occur if a user previously added to ZL UA no longer exists, or if the user is disabled. |
| **ignoreDepartmentUpdates** | Boolean | Set to True to prevent the user synchronization process from updating department information for existing users that have already been added to ZL UA. |
| **useSystemDefault** | Boolean | Set to True to designate that the agent should inherit the default run interval time. Set to False to specify a custom run interval time for the server agent with the **runInterval** field. |

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| Schema Field | Type | Description |
|---|---|---|
| **runInterval** | Integer | If **useSystemDefault** is set to False, specify the custom run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | Specify the ID of the Google Mail, Microsoft Exchange or Microsoft EWS server the agent will run on. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination |

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| Schema Field | Type | Description |
|---|---|---|
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## DELETE: Delete a Server Agent (deleteserveragent)

Delete a server agent.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **serverAgentName** | String | Specify the name of the server agent to be deleted. The REST API includes several GET endpoints you can use to retrieve server agent names and configurations. For example, you can use the GET: Get Server Agent Using Function to retrieve the names and configurations of all server agents of a given agent type (e.g., user synchronization).<br>These endpoints are described in the following sections. |
| **idMailServer** | Integer | Specify the ID of the server that the server agent to be deleted belongs to. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the server was deleted successfully.

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## GET: Get Server Agent Using Function (getagentusingfunction)

Retrieve server agents from a server that serve a specific function (e.g., Mailbox Crawl or User Synchronization).

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **agentFunction** | String | Specify the function of the server agent to be retrieved:<br>• For file archiving agents, enter **file**.<br>• For mailbox crawling agents, enter **archiving**.<br>• For user synchronization agents, enter **userSync.**<br>• For journaling agents, enter **journaling**. |
| **idMailServer** | Integer | Specify the ID of the server that the server agent belongs to. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |

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| Schema Field | Type | Description |
|---|---|---|
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination |
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## GET: Get Server Agent Using Name (getagentusingname)

Retrieve server agents from a server. Identify the server agent to be retrieved by its name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **agentName** | String | Specify the name of the server agent to be retrieved. |
| **idMailServer** | Integer | Specify the ID of the server that the server agent belongs to. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination. |
| **iterationId** | Integer | |

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| Schema Field | Type | Description |
|---|---|---|
| **iterationStartDate** | String | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## GET: Get All Agents of Mail Server (getagentusingidmailserver)

Retrieve all server agents that have been added to a particular server.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **idMailServer** | Integer | Specify the ID of the server that the server agent belongs to. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Server Agents:** The endpoint returns an entry for each server agent that has been added to the specified server. Each entry includes the following fields: | | |
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |

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| Schema Field | Type | Description |
|---|---|---|
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination, |
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## PUT: Update A Lotus Domino Journal Server Agent (updatelotusjournalagent)

Update the configuration of a Journal server agent that has been added to a Lotus Domino mail server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | Enter the server agent's name. The REST API includes several GET endpoints you can use to retrieve server agent names and configurations. For example, you can use the GET: Get Server Agent Using Function to retrieve the names and configurations of all server agents of a given agent type (e.g., user synchronization). |
| **agentType** | String | Specify **Journal** as the server agent type. |
| **mask** | Integer | Specify the desired mask number. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | Set to True to designate that the agent should inherit the default run interval time. Set to False to specify a custom run interval time for the server agent with the **runInterval** field. |
| **runInterval** | Integer | If **useSystemDefault** is set to False, specify the custom run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | Specify the ID of the Louts Domino server the agent will run on. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **lotusJournalDbName** | String | Specify a name for the Lotus database journal instance. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination, |
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## PUT: Update Lotus Domino Mailbox Crawl Server Agent (updatelotusmailboxcrawlagent)

Update a Mailbox Crawl server agent that has been added to a Lotus Domino mail server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | Enter the server agent's name. The REST API includes several GET endpoints you can use to retrieve server agent names and configurations. For example, you can use the GET: Get Server Agent Using Function to retrieve the names and configurations of all server agents of a given agent type (e.g., user synchronization). |
| **agentType** | String | Specify **Mailbox Crawl** as the server agent type. |
| **mask** | Integer | Specify the desired mask number. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | Set to True to designate that the agent should inherit the default run interval time. Set to False to specify a custom run interval time for the server agent with the **runInterval** field. |
| **runInterval** | Integer | If **useSystemDefault** is set to False, specify the custom run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | Specify the ID of the Louts Domino server the agent will run on. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |
| **scanChildServers** | Boolean | Set to True if this Domino server is a parent server whose child servers should be scanned as well. |
| **threadLimit** | Integer | Specify the number of threads the agent should be able to use during the crawling process. This is only applicable if the **scanChildServers** setting is set to True. |

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### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination. |
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## PUT: Update a Server Agent (updateserveragent)

Update a server agent that has been created for the following purposes:

- **File Archive:** Any agent to archive files from any of the following server types: file share, SharePoint, Google Drive and OneDrive.
- **Mailbox Crawl:** Any agent to crawl mailboxes for any of the following server types: Google Mail, Microsoft Exchange and Microsoft EWS.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | Enter the server agent's name. The REST API includes several GET endpoints you can use to retrieve server agent names and configurations. For example, you can use the GET: Get Server Agent Using Function to retrieve the names and configurations of all server agents of a given agent type (e.g., user synchronization). |
| **agentType** | String | Specify the server agent type:<br>• For a file share archiving agent, enter **file**.<br>• For a SharePoint archiving agent, enter **sharepointFile**.<br>• For a GoogleDrive archiving agent, enter **gdDriveFile**.<br>• For a OneDrive archiving agent, enter **onedriveFile**.<br>• For an agent to crawl mailboxes for Google Mail, Microsoft Exchange and Microsoft EWS servers, enter **mbCrawl**. |
| **mask** | Integer | Specify the desired mask number. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | Set to True to designate that the agent should inherit the default run interval time. Set to False to specify a custom run interval time for the server agent with the **runInterval** field. |

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| Schema Field | Type | Description |
|---|---|---|
| **runInterval** | Integer | If **useSystemDefault** is set to False, specify the custom run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | Specify the ID of the server the agent will run on. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination. |
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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## PUT: Update a User Synchronization Mail Server Agent (updateusersyncserveragent)

Update a User Synchronization server agent that has been added to a Microsoft Exchange, Microsoft EWS or Google Mail Server.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | Enter the server agent's name. The REST API includes several GET endpoints you can use to retrieve server agent names and configurations. For example, you can use the GET: Get Server Agent Using Function to retrieve the names and configurations of all server agents of a given agent type (e.g., user synchronization). |
| **agentType** | String | Specify the server agent type:<br>• For user synchronization on a Microsoft Exchange server, enter **exchangeUserSync**.<br>• For user synchronization on a Microsoft EWS server, enter **ewsUserSync**<br>• For user synchronization on a Google Mail server, enter **googleUserSync** |
| **defaultDepartment** | Integer | Specify the ID of the default department to assign users to during user synchronization. The UAA/Departments endpoints provide several ways to retrieve department IDs. For more information, refer to *UAA/Departments* on page 97. |
| **autoCreate** | Boolean | Set to True to create user accounts for any new users found during synchronization. |
| **autoTerminate** | Boolean | Set to True to automatically terminate users during synchronization if necessary. This may occur if a user previously added to ZL UA no longer exists, or if the user is disabled. |
| **ignoreDepartmentUpdates** | Boolean | Set to True to prevent the user synchronization process from updating department information for existing users that have already been added to ZL UA. |

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| Schema Field | Type | Description |
|---|---|---|
| **useSystemDefault** | Boolean | Set to True to designate that the agent should inherit the default run interval time. Set to False to specify a custom run interval time for the server agent with the **runInterval** field. |
| **runInterval** | Integer | If **useSystemDefault** is set to False, specify the custom run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | Specify the ID of the Google Mail, Microsoft Exchange or Microsoft EWS server the agent will run on. You can obtain server IDs with the GET: Get All Severs endpoint, as described on page 249. |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **agentName** | String | The server agent's name. |
| **agentType** | String | The server agent's type. |
| **mask** | Integer | The server agent's mask value. Each server agent can be associated with multiple server masks. The users on the mail server get distributed almost equally among Mail Server Agent Global Tasks corresponding to associated masks when the agent runs. This is useful in properly scheduling the times at which mailbox crawling is performed and scaling up the crawling performance. |
| **useSystemDefault** | Boolean | If True, the agent will inherit the default run interval time. If False, the agent will use a custom run interval time. |
| **runInterval** | Integer | The run interval time (in seconds) for the server agent. |
| **mailServerId** | Integer | The ID of the server the agent will run on. |
| **mapParams** | String | Additional information about the agent. This varies depending on the agent type. For example, for a mailbox crawling agent, it will indicate how many threads the agent uses. For a user synchronization agent, it will indicate the agent's options for automatic user creation and termination. |

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| Schema Field | Type | Description |
|---|---|---|
| **iterationId** | Integer | These fields provide information about the last iteration of the server agent, i.e., the last time the server agent ran. This includes the date and time the last iteration started and ended, and the date that the next iteration is scheduled. |
| **iterationStartDate** | String | |
| **iterationUpdate** | String | |
| **iterationEndDate** | String | |
| **nextIterationDate** | String | |

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# FAM/Projects

A project represents a collection of folders and directories on a server that is grouped together for use within the FAM module. Use the FAM/Projects endpoints to create, update and view projects for use in the FAM module.

**Note:** Although these endpoints are used to create projects for use with the FAM module, the request and response data for these endpoints is the same as the request and response data for the endpoints used to create UAA projects. For descriptions of the request and response data, refer to *UAA Projects* on page 338.

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# FAM/Tags

Tags are customizable labels that can be applied to documents for various purposes. You could apply tags to the results of a search or file sampling to mark those files for retrieval later or apply tags to mark files that are subject to review, and so on.

You can also use tags for remediation. When you configure remediation, you assign an action to a tag (e.g., to copy, delete, or move the file). When you execute remediation, that action will be applied to all the files that the tag has been applied to. For example, you could use remediation to move all files that a tag has been applied to from one folder to another.

You can upload tag definition files and tag specifications into ZL UA to create tags for use in your system:

- A tag definition file defines and creates tags. These tags can be applied to files manually, or via a tag specification.
- A tag specification defines a set of rules and conditions, each of which of which specifies a tag that will be applied to files that meet the terms of the rules and conditions. For example, you could create a tag specification to tag all files that contain the phrase confidential agreement" in the body of an email with the "Privileged" tag. You can upload tag specifications that will tag files based on content, metadata and PII data.

The following sections describe how to manage tags in REST API, and how to upload tag definition files and tag specification files:

- *DELETE: Delete Tag (deletetag)*
- *GET: Get All Tags of a Project (getalltagsofaproject)*
- *GET: Get Tag Using ID (gettagusingid)*
- *GET: Get Tag Using Name (gettagusingname)*
- *POST: Upload Content Spec (uploadcontenttagspec)*
- *POST: Upload MetaData Spec (uploadmetadataspec)*
- *POST: Upload PII Tags (uploadPIIspec)*
- *POST: Upload Tag Definition File (uploadtags)*

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## DELETE: Delete Tag (deletetag)

Delete a tag.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project that the tag to be deleted belongs to. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **tagId** | Integer | Specify the ID of the tag to be deleted. |

### Request Schema Fields

None.

### Response Schema Fields

None.

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## GET: Get All Tags of a Project (getalltagsofaproject)

Retrieve the tags that have been created within a specific project.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **Tag Entries:** The endpoint returns an entry for each tag that has been added to the specified project. The schema fields included in each entry are described below. | | |
| **parent** | String | The name of the tag's parent tag. |
| **id** | Integer | The tag ID. |
| **projectId** | Integer | The ID of the project the tag belongs to. |
| **parentId** | String | The ID of the tag's parent tag. |
| **name** | String | The internal name of the tag. |
| **displayName** | String | The display name of the tag. |

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| Schema Field | Type | Description |
|---|---|---|
| **tagFlags** | Array | An array of Boolean values indicating the status of various tag attributes. |
| **root_node** | Boolean | Indicates the tag is the root tag. |
| **read_only** | | Indicates the tag is read-only. |
| **enduser_tag** | | Indicates that the tag can be applied manually. |
| **auto_tag** | | Indicates that the tag can be applied automatically, i.e., via a tag specification file. |
| **max_tag** | | Indicates the tag is a mutually exclusive tag. |
| **tag_32** | | Indicates the tag is a PII tag. |
| **tag_64** | | Indicates the tag is a content tag. |
| **description** | | A description of the tag. |
| **createDate** | | The date and time that the tag was created. |

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## GET: Get Tag Using ID (gettagusingid)

Retrieve the configuration of a specific tag. Specify the tag by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project the tag belongs to. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **tagId** | Integer | Specify the ID of the tag you want to view. |

### Request Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **parent** | String | The name of the tag's parent tag. |
| **id** | Integer | The tag ID. |
| **projectId** | Integer | The ID of the project the tag belongs to. |
| **parentId** | String | The ID of the tag's parent tag. |
| **name** | String | The internal name of the tag. |
| **displayName** | String | The display name of the tag. |

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| Schema Field | Type | Description |
|---|---|---|
| **tagFlags** | Array | An array of Boolean values indicating the status of various tag attributes. |
| **root_node** | Boolean | Indicates the tag is the root tag. |
| **read_only** | | Indicates the tag is read-only. |
| **enduser_tag** | | Indicates that the tag can be applied manually. |
| **auto_tag** | | Indicates that the tag can be applied automatically, i.e., via a tag specification file. |
| **max_tag** | | Indicates the tag is a mutually exclusive tag. |
| **tag_32** | | Indicates the tag is a PII tag. |
| **tag_64** | | Indicates the tag is a content tag. |
| **description** | | A description of the tag. |
| **createDate** | | The date and time that the tag was created. |

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## GET: Get Tag Using Name (gettagusingname)

Retrieve the configuration of a specific tag. Specify the tag by its name.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **projectId** | Integer | Specify the ID of the project the tag belongs to. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **tagName** | String | Specify the name of the tag you want to view. |

### Request Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **parent** | String | The name of the tag's parent tag. |
| **id** | Integer | The tag ID. |
| **projectId** | Integer | The ID of the project the tag belongs to. |
| **parentId** | String | The ID of the tag's parent tag. |
| **name** | String | The internal name of the tag. |
| **displayName** | String | The display name of the tag. |

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| Schema Field | Type | Description |
|---|---|---|
| **tagFlags** | Array | An array of Boolean values indicating the status of various tag attributes. |
| **root_node** | Boolean | Indicates the tag is the root tag. |
| **read_only** | | Indicates the tag is read-only. |
| **enduser_tag** | | Indicates that the tag can be applied manually. |
| **auto_tag** | | Indicates that the tag can be applied automatically, i.e., via a tag specification file. |
| **max_tag** | | Indicates the tag is a mutually exclusive tag. |
| **tag_64** | | Indicates the tag is a content tag. |
| **tag_64** | | Indicates the tag is a content tag. |
| **description** | | A description of the tag. |
| **createDate** | | The date and time that the tag was created. |

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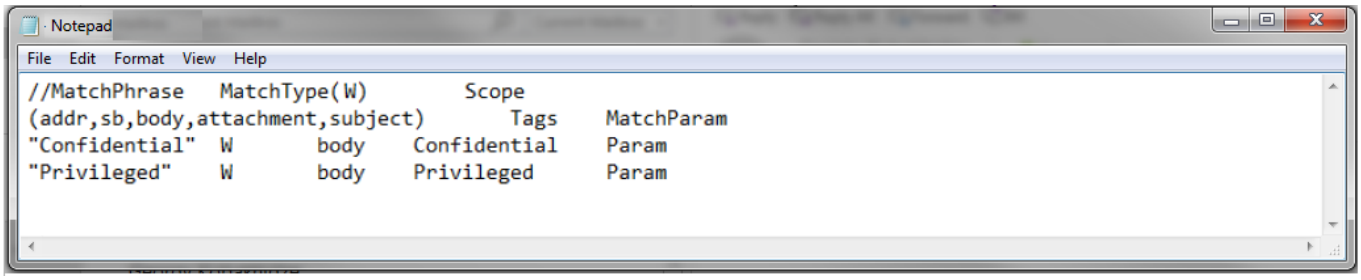
## POST: Upload Content Spec (uploadcontenttagspec)

Upload a Content Tag Specification. A Content Tag Specification is a a formatted, tab-delimited TXT file that defines a set of rules, each of which includes a user-specified phrase and a tag. The rules are checked against the contents of each file within a project, and if a file includes the specified phrase, then the tag for the rule is applied to the file.

For example, you could create a rule to apply the “Privileged” tag to all files that contain the phrase “confidential agreement.” This rule is shown in the example below:




Each rule includes several parameters, and uses the following format:

```
//MatchPhrase MatchType Scope Tags Match Param
```

The parameter values must be separated by tabs. They are described below:

- **MatchPhrase**: The word or phrase to identify for tagging. This string must be surrounded by double quotes.
- **MatchType**: Must be set to “W,” indicating that a file’s content must match the word/phrase specified as the MatchPhrase for the tag to be applied.
- **Scope**: The part of the message to check for auto-tagging purposes. This must be set to “body.”
- **Tags**: The existing case tag to be automatically applied to case items that contain the specified MatchPhrase within the specified content Scope. This tag must already exist for the tag spec rule to be successfully added.
- **MatchParam**: Must be “Param.”

Please note that after uploading a Content Tag Specification into a project, you must execute the **Run Content Tagger** background task to apply the tag specification to the project, and then execute the **Update Index** and **Clear Cache** background tasks to update the project tag index and clear the cache. For more information, refer to *FAM/Tasks* on page 296.

### Request Parameters

None.

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### Request Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | The ID of the project that the Content Tag Specification will be uploaded to. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint.<br><br>The tags defined within the specification will be applied to all files included in the project the next time the Run Content Tagger and Update Index background tasks are run. For more information, refer to *POST: Run Content Tagger* on page 301 and *POST: Update Index* on page 306. |
| **tagContent** | String | Copy the contents of the tab-delimited text file. |

### Response Schema Fields

A string indicating whether the upload was successful.

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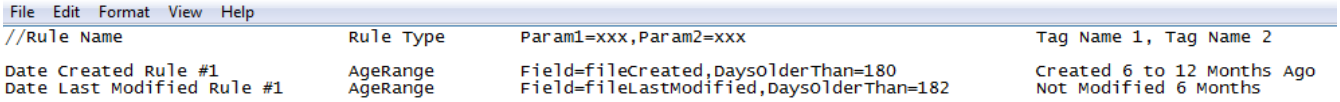
## POST: Upload MetaData Spec (uploadmetadataspec)

Upload a Metadata Tag Specification. A Metadata Tag Specification is a formatted, tab-delimited TXT file that defines a set of rules to be compared to each file's metadata properties (e.g., date created, date last modified, date last accessed, ACL owner). Each rule specifies 1 or 2 tags that will be applied to files with metadata that satisfy the conditions of the rule. For example, a rule can be created to apply a tag to all files that were created within a specified date range.

The following is an example metadata tag specification that defines two rules:




Each rule consists of several tab-separated fields, and uses the following format:

```
//RuleName  RuleType     Param1=xxx,Param2=xxx   Tag Name 1, Tag Name 2
```

The fields are described below:

### Rule Name

The name of the rule.

### Rule Type

The type of rule. This includes the following options:

- **AgeRange:** Check the age of a file.
- **ACLDepartment**: Check the ACL department associated with a file.
- **PathRegex**: Check if the file name or folder name includes the term defined by a RegEx (regular expression) pattern. The FAM module supports the standard RegEx syntax.

### Param1=xxx, Param2=xxx

These determine how the rule will be compared to each file's metadata. A rule may include one or more parameters, which must be comma-separated. The available parameters vary depending on the **RuleType** selected:

- **AgeRange:** This includes the following options:

  **fileLastModified, fileLastAccessed, fileCreated, DaysOlderThan, DaysYoungerThan**

  **Param1** should specify which file attribute is being examined: the date the file was last modified, the date it was last accessed, or the date it was created (**fileLastModified**, **fileLastAccessed**, or **fileCreated**). Each rule can check one of these attributes.

  **Param2** should specify how the attribute should be checked (**DaysOlderThan** or **DaysYoungerThan**).

  For example, the following parameters would return True and tag files that were created more 180 days ago:

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```
Field=fileCreated, DaysOlderThan=180
```

The following examples would return True and tag files that were modified in the last 30 days:

```
Field=fileLastModified, DaysYoungerThan=30
```

The following examples would return True and tag files that were last accessed between 30 and 60 days ago:

```
Field = fileLastAccessed, DaysOlderThan=30, DaysYoungerThan=60
```

- **ACLDepartment:** This includes the following options:

  **OwnerOnly (true/false), Departmentname = [name of department in ZL]**

  To check if file's ACL owner belongs to a certain department, use **OwnerOnly** as **Param1** and the **DepartmentName** as **Param2**. For example, the following parameters would return True and tag any file whose "ACL owner" belongs to the "zlps" department:

  ```
  OwnerOnly=true, DepartmentName=zlps
  ```

  To check if a file's ACL user list includes members of a certain department, use **DepartmentName** as **Param1** and omit the second parameter. The following would return True and tag any file that has users from the "zlps" departments on its ACL:

  ```
  DepartmentName=zlps
  ```

- **PathRegex:** ParseFolderNames (true/false), ParseFileName (true/false), Regex

  **Param1** should specify whether the file's name or the file's folder name should be checked (**ParseFolderNames** or **ParseFileName**).

  **Param2** should define a regular expression (**Regex**). The condition will check the file name or the file's folder name for that expression. The FAM module supports the standard RegEx syntax.

  For example, the following rule would return True and tags files where the file name includes "HR or "human":

  ```
  ParseFileName=true, Regex=(?i)(hr|human)
  ```

### Tag Name 1, Tag Name 2

Specify one or two tags that will applied to files that meet the specified conditions. These must match the names of existing tags (i.e., the metadata tag specification cannot create new tags).

Please note that after uploading a Metadata Tag Specification into a project, you must execute the **Run Metadata Tagger** background task to apply the tag specification to the project, and then execute the **Update Index** and **Clear Cache** background tasks to update the project tag index and clear the cache. For more information, refer to *FAM/Tasks* on page 296.

### Request Parameters

None.

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### Request Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | The ID of the project the Metadata Tag Specification will be uploaded to. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint.<br>The tags defined within the specification will be applied to all files included in the project the next time the Run Metadata Tagger and Update Index background tasks are run. For more information, refer to *POST: Run Metadata Tagger* on page 303 and *POST: Update Index* on page 306. |
| **tagContent** | String | Copy the contents of the tab-delimited text file. |

### Response Schema Fields

A string indicating whether the upload was successful.

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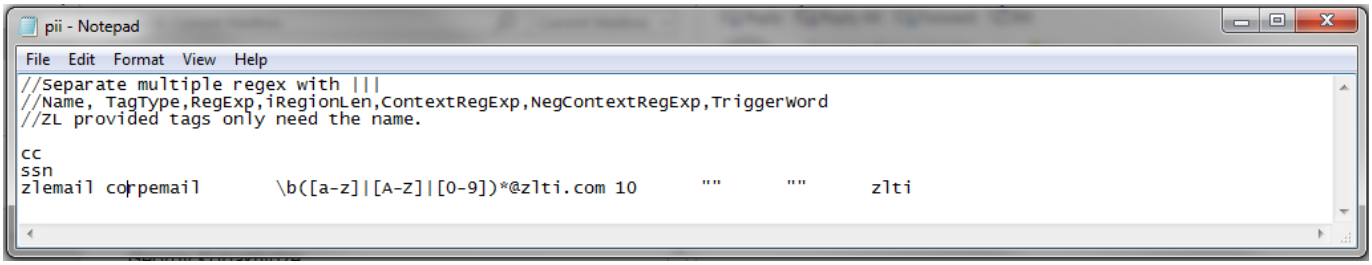
## POST: Upload PII Tags (uploadPIIspec)

Upload a PII Tag Specification. A PII Tag Specification is a a formatted, tab-delimited TXT file defining a set of rules that will be compared to each file's content. Each rule specifies a tag that will be applied to files with content that satisfy the conditions of the rule.

This is similar to Content Tag Specifications. However, PII tag specifications differ from content tag specifications in several ways:

- PII patterns are intended to be used to search specifically for files that include information like credit card numbers, social security numbers, and addresses. For example, a rule can be created to tag all items that contain an email address or a social security number.
- PII tag specifications not only define the rules used to determine which files PII tags should be applied to, but also define the PII tags themselves. PII tag specifications cannot use existing tags.




Each rule includes several parameters, and uses the following format:

```
//Name, TagType, RegExp, iRegionLen, ContextRegExp, NegContextRegExp, TriggerWord
```

The parameter values must be separated by tabs. They are described below.

- **Name**: The name of the PII tag that will be created and applied to files that meet the conditions of this rule. Each PII tag must be assigned a unique name.
- **TagType:** A description of the PII tag. This can match the name, if desired.
- **RegExp**: A regular expression (RegEx) to search for. The FAM module supports the standard RegEx syntax. A file must include this expression in order for the PII tag to be applied.
- **iRegionLen**: Optional. Specify the length of the region (in characters) to look for the terms specified for the ContextRegExp and/or NegContextRegExp fields in relation to the term specified for the **RegEx** field.
- **ContextRegExp** [Optional]: An additional RegEx term. If specified, this term must occur within X characters of the term defined by the RegEx field for the PII tag to be applied, where X is the value of the **iRegionLen** field.
- **NegContextRegExp** [Optional]: An additional RegEx term. If specified, this term may **not** occur within X characters of the term defined by the **RegEx** field for the PII tag to be applied, where X is the value of the **iRegionLen** field.
- **TriggerWord** == [Optional]: An additional keyword(s) that the file must include for the PII tag to be applied. These keyword(s) can be anywhere in the file, meaning that they are not affected by the **iRegionLen** field.

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- You can apply multiple trigger keywords. They must be separated with the following characters:

  |||

  For example, if you wanted to specify “litigation”, “copyrite” and “trial” as additional keywords, you would enter:

  ```
  litigation ||| copyrite ||| trial
  ```

Please note that after uploading a PII Tag Specification into a project, you must execute the **Run PII Tagger** background task to apply the tag specification to the project, and then execute the **Update Index** and **Clear Cache** background tasks to update the project tag index and clear the cache. For more information, refer to *FAM/Tasks* on page 296.

### Request Parameters

None.

### Request Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | The ID of the project the PII Tag Specification will be uploaded to. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint.<br>The tags defined within the specification will be applied to all files included in the project the next time the Run Content Tagger and Update Index background tasks are run. For more information, refer to *POST: Run PII Tagger* on page 304 and *POST: Update Index* on page 306. |
| **tagContent** | String | Copy the contents of the tab-delimited text file. |

### Response Schema Fields

A string indicating whether the upload was successful.

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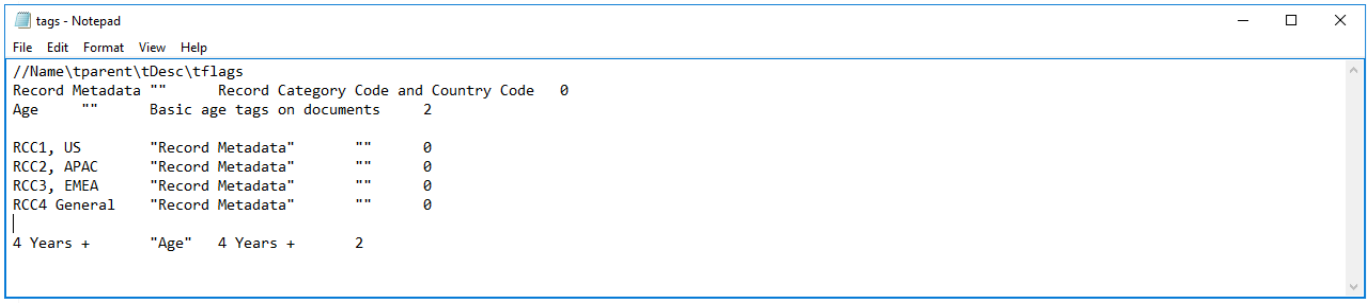
## POST: Upload Tag Definition File (uploadtags)

Upload a Tag Definition File. A Tag Definition File is a formatted, tab-delimited TXT file that defines new tags to be applied within a project. The following image depicts a sample tag definition file:




Each tag definition consists of four tab-separated fields, and uses the following format:

```
//Name      tParent     tDesc tFlags
```

The fields are described below:

- **Name:** The name of the tag to be created.
- **tParent:** The name of the existing parent tag under which the new tag will be created. The parent tag must already exist for the new tag to be added successfully.

  If the new tag doesn't have a parent, leave this field empty as " ".
- **tDesc**: The description of the tag.
- **tFlags:** Specifies how the tag can be applied to files. If the tag is to be applied manually or via a tag specification, enter 0. If the tag is only to be applied via a tag specification only, enter 2.

Please note that after uploading a Tag Definition File into a project, you must execute the **Update Index** and **Clear Cache** background tasks to update the project tag index and clear the cache. For more information, refer to *FAM/Tasks* on page 296.

### Request Parameters

None.

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### Request Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **projectId** | Integer | The ID of the project the Tag Definition File will be uploaded to. You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint.<br>The tags defined within the specification will be available for application within that project the next time the Update Index background task is run. For more information, refer to *POST: Update Index* on page 306. |
| **tagContent** | String | Copy the contents of the tab-delimited text file. |

### Response Schema Fields

A string indicating whether the upload was successful.

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# FAM/Task Sets

The ZL FAM module includes background tasks that must be executed after the completion of certain operations. For example, after creating a project, you would need to execute the **Run Crawl**, **Update Content Index**, **Update Index** and **Clear Cache** background tasks to scan the project directories for files, and update the project's content index and tag index.

You can create task sets to run background tasks simultaneously, on an on-demand basis or at regularly scheduled intervals. Each task set configuration includes a group of background tasks and a list of projects and dashboards that the task set is applicable to. When the task set is executed, all of the background tasks will be executed upon the specified projects and upon all projects included in the specified dashboards.

The following sections describe the FAM/Task Sets endpoints available in the REST API. You can use these endpoints to create and manage task sets:

- *POST: Add Task Set Entries (addentries)*
- *DELETE: Delete Task Set Entry (deleteEntry)*
- *GET: Get All Task Set Entries (getAllEntries)*
- *GET: Get All Entries Using Pattern (getallentriesusingpattern)*
- *GET: Get a Task Set Using ID (getusingid)*
- *POST: Update Task Set Entry (updateentry)*

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## POST: Add Task Set Entries (addentries)

Create a task set. You will specify which projects and dashboards the task set will be applicable to, and which background tasks will be run when the task set is executed.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **name** | String | Specify the name of the task set. |
| **projectIds** | Array | Specify the IDs of the project(s) that the task set will apply to. The tasks included in this task set will be executed upon these projects. If you want to apply the task set to multiple projects, specify the projects as a comma-separated list. For example:<br>`"projectIds": [ 1,2,3 ]`<br>You can obtain FAM project IDs with the FAM/Projects/GET: Get All Projects endpoint. |
| **dashboardIds** | Array | Specify the IDs of the dashboard(s) that the task set will apply to. The tasks included in this task set will be executed upon the projects included in each of these dashboards. If you want to apply the task set to multiple dashboards, specify the IDs as a comma-separated list. For example:<br>`"dashboardIds": [ 1,2,3 ]`<br>You can retrieve dashboard IDs with the GET: Get All Dashboards endpoint, as described in *GET: Get All Dashboards (getalldashboards)* on page 271. |

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| Schema Field | Type | Description |
|---|---|---|
| **fRunCrawl** | Boolean | Set to True to include the Run Crawl task in the task set. This task scans the project directories specified for the project and add the contents to the project. |
| **fContentIndex** | Boolean | Set to True to include the Update Content Index task in the task set. This task updates the project's content index, so that you can search the contents of any new files that have been added to the project. |
| **fMetaDataTagger** | Boolean | Set to True to include the MetaData Tagger task in the task set. This applies any metadata tag specifications that have been added to the project to the project files. A metadata tag specification defines a set of rules that will be checked against each file's metadata properties (e.g., date created, date last modified, date last accessed, ACL owner), and applies tags to the files matching those rules. |
| **fContentTagger** | Boolean | Set to True to include the Content Tagger task in the task set. This task applies the tags defined in any tag specification files that have been added to the project to the project's files. |
| **fPIITagger** | Boolean | Set to True to include the PII Tagger in the task set. This applies the tags defined in any PII tag specifications the project includes to the files included in the project. PII tag specifications are compared to each file's content to search specifically for files that include personal information such as credit card numbers, social security numbers, and addresses, and applies tags to the files matching the specification parameters. |
| **fUpdateIndex** | Boolean | Set to True to include the Update Index task in the task set. This updates the tagging information for the files included in the project. |
| **fSearches** | Boolean | Set to True to include the Run All Searches task in the task set. In the FAM module, single project searches include an option to save a search so that you can access it later. Unsaved searches are retained temporarily. Execute the Run All Searches task to re-run these searches and update the search results. |
| **fRemediation** | Boolean | Set to True to include the Run Remediation task in the task set. In ZL UA, you can assign an action (e.g., copy to a new folder, delete, archive, etc) to a tag, so that the action can be carried out upon all the files that the tag has been applied to at once. This is referred to as a remediation. When the Run Remediation task is executed on a project, all remediation actions configured for the project will be performed when you run this task. |

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### Response Schema Fields

| Parameter | Type | Description |
|---|---|---|
| **id** | Integer | The dashboard ID. |
| **taskSetName** | String | The task set name. |
| **projectName** | String | The name of the project(s) the task set is applicable to. |
| The remaining fields are Boolean values indicating which tasks were added to the task set. For example, if **fRunCrawl** is set to True, it indicates that the Run Crawl task was added to the task set. | | |

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## DELETE: Delete Task Set Entry (deleteEntry)

Delete a task set.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **entryId** | Integer | Specify the ID of the task set to be deleted. You can use the GET: Get All Task Set Entries endpoint described in the next section to retrieve task set configurations and ID values. |

### Request Schema Fields

None.

### Response Schema Fields

None.

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## GET: Get All Task Set Entries (getAllEntries)

Retrieve the configurations of the task sets that have been added to the system.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema includes an entry for each task set. The response schema fields returned for each task set are the same as those included in the response returned after the task set was created. For descriptions of these fields, refer to *POST: Add Task Set Entries* on page 442.

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## GET: Get All Entries of a Task Set (getallentriesofset)

Retrieve the configuration of a specific task set.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **taskSetName** | String | Specify the name of the task set to be retrieved. You can use the GET: Get All Task Set Entries endpoint described in the previous section to retrieve task set configurations and names. |
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema includes an entry for each dashboard that has been added to the specified task set. The response schema fields returned for each dashboard are the same as those included in the response returned after the task set was created. For descriptions of these fields, refer to *POST: Add Task Set Entries* on page 442.

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## GET: Get All Entries Using Pattern (getallentriesusingpattern)

Retrieve the configurations of the task sets that have been added.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **pattern** | String | Enter the search pattern. The search will return task sets whose name includes or is similar to the search pattern. |
| **page**<br>**pageSize** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema includes an entry for each task set. The response schema fields returned for each task set are the same as those included in the response returned after the task set was created. For descriptions of these fields, refer to *POST: Add Task Set Entries* on page 442.

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## GET: Get a Task Set Using ID (getusingid)

Retrieve the configurations of a task set. Identify the task set by its ID.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **entryId** | String | Specify the task set ID. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the task set are the same as those included in the response returned after the task set was created. For more information, refer to *POST: Add Task Set Entries* on page 442.

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## POST: Update Task Set Entry (updateentry)

Update the configuration of a task set. Specify the task set to be updated by its ID.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **id** | Integer | Specify the ID of the task set to be updated. You can use the GET: Get All Task Set Entries endpoint described previously to retrieve task set configurations and ID values. |
| **taskSetName** | String | Specify the name of the task set. |
| **projectName** | String | Specify the name of the project. |
| **fRunCrawl** | Boolean | Set to True to include the Run Crawl task in the task set. This task scans the project directories specified for the project and add the contents to the project. |
| **fContentIndex** | Boolean | Set to True to include the Update Content Index task in the task set. This task updates the project's content index, so that you can search the contents of any new files that have been added to the project. |
| **fMetaDataTagger** | Boolean | Set to True to include the MetaData Tagger task in the task set. This applies any metadata tag specifications that have been added to the project to the project files. A metadata tag specification defines a set of rules that will be checked against each file's metadata properties (e.g., date created, date last modified, date last accessed, ACL owner), and applies tags to the files matching those rules. |
| **fContentTagger** | Boolean | Set to True to include the Content Tagger task in the task set. This task applies the tags defined in any tag specification files that have been added to the project to the project's files. |
| **fPIITagger** | Boolean | Set to True to include the PII Tagger in the task set. This applies the tags defined in any PII tag specifications the project includes to the files included in the project. PII tag specifications are compared to each file's content to search specifically for files that include personal information such as credit card numbers, social security numbers, and addresses, and applies tags to the files matching the specification parameters. |

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| Schema Field | Type | Description |
|---|---|---|
| **fUpdateIndex** | Boolean | Set to True to include the Update Index task in the task set. This updates the tagging information for the files included in the project. |
| **fSearches** | Boolean | Set to True to include the Run All Searches task in the task set. In the FAM module, single project searches include an option to save a search so that you can access it later. Unsaved searches are retained temporarily. Execute the Run All Searches task to re-run these searches and update the search results. |
| **fRemediation** | Boolean | Set to True to include the Run Remediation task in the task set. In ZL UA, you can assign an action (e.g., copy to a new folder, delete, archive, etc) to a tag, so that the action can be carried out upon all the files that the tag has been applied to at once. This is referred to as a remediation. When the Run Remediation task is executed on a project, all remediation actions configured for the project will be performed when you run this task. |

### Response Schema Fields

The response schema matches the request schema provided.

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# UAA/Users

A user is a person whose email address(es) and alias(es) are recognized in the ZL UA system. All users registered in ZL UA are associated with one department. Users can inherit policy settings from their department. However, privileged users can configure custom settings to override the inherited department settings for a particular user. A ZL UA user typically has a primary email address, as well as one or more *alias* email addresses which can be used to locate that user.

The following sections describe the UAA/Users endpoints available in the REST API. You can use these endpoints to create and manage users within the FAM module and ZL UA:

- *PUT: Add User Alias (addUserAlias)*
- *POST: Create User (createUser)*
- *DELETE: Delete User (deleteUser)*
- *GET: Get All Department Users (getAllDepartmentUsers)*
- *GET: Get All User Aliases (getAllUserAliases)*
- *GET: Get User Using Address (getUserUsingAddress)*
- *GET: Get User Using Alias Address (getUserUsingAliasAdress)*
- *GET: Get User Using External Reference (getUserUsingExternalReference)*
- *GET: Get User Using Owner (getUserUsingOwner)*
- *GET: Get User Using ZLP ID (getUserUsingId)*
- *PUT: Move User to a New Department (moveUserToNewDepartment)*
- *PUT: Remove User Alias (removeAlias)*
- *PUT: Restore Terminated User (restoreTerminatedUser)*
- *PUT: Terminate User (terminateUser)*
- *PUT: Update User Account Information (updateUserAccountInfo)*
- *PUT: Update User Email Address (updateUserEmailAddress)*
- *PUT: Update User Mail Server Information (updateUserMailServerInfo)*
- *PUT: Update User Owner (updateUserOwnerField)*
- *PUT: Update User Sync Status (updateUserSyncExclude)*

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## PUT: Add User Alias (addUserAlias)

Add an alias to a user.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZLP user ID of the user you want to add the alias to. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **alias** | String | Enter the alias name. |
| **aliasType** | Integer | Specify the alias type:<br>• 0: Default (Email)<br>• 1: X500 DN<br>• 2: Address<br>• 3: Manual<br>• 4: Exchange Legacy DN<br>• 5: Transformed Lotus DN<br>• 6: NetBios User Name<br>• 100: IM<br>• 200: Bloomberg<br>• 300: Parlano |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **alias** | String | The alias name. |
| **zlpUserId** | Integer | The ZL user ID of the user the alias has been added to. |
| **archiveServerDept** | Integer | The department the user is assigned to. |

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| Schema Field | Type | Description |
|---|---|---|
| **iType** | Integer | The alias type:<br>• 0: Default (Email)<br>• 1: X500 DN<br>• 2: Address<br>• 3: Manual<br>• 4: Exchange Legacy DN<br>• 5: Transformed Lotus DN<br>• 6: NetBios User Name<br>• 100: IM<br>• 200: Bloomberg<br>• 300: Parlano |
| **dateCreated** | String | The date and time the alias was created. |

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## POST: Create User (createUser)

Create a new user. After creating the user, you should configure the user's mail server information with the PUT: Update Mail Server Information endpoint. For more information, refer to *PUT: Update User Mail Server Information* on page 473.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **departmentName** | String | Specify the name of the department to add the user to. |
| **userAddress** | String | Specify the primary email address associated with the user. |
| **owner** | String | Specify the user's owner. This is meant to identify the user's manager or the user's creator. |
| **externalReference** | String | Enter any unique IDs or information used outside of ZL UA that is relevant to the user here. |
| **userTags** | String | Specify any user tags to apply to the user as a comma-separated list. |
| **retentionTags** | String | Specify any retention tags to apply to the user as a comma-separated list. |
| **altReviewDepartment** | String | Specify the Alternative Review Department to add the user to. |
| **fullName** | String | The first and last name of the user. |
| **userType** | Integer | Specify 0 to create a new user, or 100 to create a user group. |
| **dateHired** | String | The date the user was hired. This should match the format shown in Swagger. |
| **fTerminated** | Boolean | Specify if the user has been terminated (True) or not (False). |
| **dateTerminated** | String | Specify the date the user was terminated, if applicable. This should match the format shown in Swagger. |
| **miscField1**<br>**miscField2** | String | Use these fields to enter any additional information required for the user. |

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| Schema Field | Type | Description |
|---|---|---|
| **fSyncIncluded** | Boolean | Specify whether the user should be included (True) in LDAP User Synchronizations or not (False). |

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **idZlpUser** | Integer | The ZL user ID assigned to the user. |
| **iType** | Integer | The user type: 0 for a user, or 100 for a user group. |
| **address** | String | The user's primary email address. |
| **owner** | String | The user's owner. This is meant to identify the user's manager or the user's creator. |
| **extReference** | String | Unique ID or information used outside of ZL UA that is relevant to the user. |
| **userTags** | String | User tags applied to the user. |
| **retTags** | String | Retention tags applied to the user. |
| **altReviewDepts** | String | The Alternate Review Department(s) the user is assigned to. |
| **deptName** | String | The department the user is assigned to. |
| **reviewDeptName** | String | The Review Department the user is assigned to. |
| **mailServerName** | String | The mail server for this user. |
| **mailStoreInfo** | String | Mail store information for this user. |
| **syncExclude** | Boolean | Indicates whether the user should be excluded (True) from User Synchronizations or not (False). |
| **archive** | Boolean | Set to True if the user is available for archiving and journaling, respectively. |
| **journal** | Boolean | |
| **fullName** | String | The first and last name of the user. |
| **dateCreate** | String | The date and time the user was created. |

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| Schema Field | Type | Description |
|---|---|---|
| **dateLastUpdate** | String | The date and time the user last updated. |
| **connectUserId** | String | The user ID used to connect to the user's mail server. |
| **dateHired** | String | The date and time the user was hired. |
| **dateTerminated** | String | The date and time the user was terminated, if applicable. |
| **terminated** | Boolean | Indicates whether the user has been Terminated (True) or not. |
| **dateIterStart** | String | These fields indicate that date and time that the last user synchronization process started and ended, and the date and time that the user's information was updated during synchronization. |
| **dateIterEnd** | String | |
| **dateIterUpdate** | String | |
| **dateFullScanStart** | String | The date and time that the last full scan of the user's mailbox began. |
| **dateFullScanEnd** | String | The date that the last full scan of the user's mailbox ended. |
| **dateArchiveBegin** | String | The date and time that archiving of the user's date began. |
| **miscField1**<br>**miscField2** | String | Additional information entered for the user. |

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## DELETE: Delete User (deleteUser)

Delete a user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to delete. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string message indicating whether the user was successfully deleted or not.

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## GET: Get All Department Users (getAllDepartmentUsers)

Retrieve a list of users that are assigned to a specific department.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **departmentName** | String | Specify the name of the department whose users you want to view. The REST API includes several endpoints you can use to retrieve department configuration names. For further details on these endpoints, refer to *UAA/Departments* on page 97 |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **User Entries:** Includes an entry for user that is included in the specified department. The fields included in each entry are the same as those included in the response after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455. | | |

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## GET: Get All User Aliases (getAllUserAliases)

Retrieve a list of aliases that are assigned to a specific user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | String | Specify the ID of the user whose aliases you want to view. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **page** | Integer | Some operations return too many values for the UI to display. You can use the **page** parameter to indicate the page number on which these values should be displayed, and the **pageSize** parameter to indicate the maximum number of items that can be displayed on the page.<br>The **pageSize** parameter defaults to 200 and has a maximum size of 1,000. |
| **pageSize** | Integer | |

### Request Body Schema Fields

None.

### Response Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **User Alias Entries:** Includes an entry for each alias that has been assigned to the user. The following fields are included in each entry: | | |
| **alias** | String | The alias name. |
| **zlpUserId** | Integer | The ZL user ID of the user the alias has been added to. |
| **archiveServerDept** | Integer | The department the user is assigned to. |

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| Schema Field | Type | Description |
|---|---|---|
| **iType** | Integer | The alias type:<br>• 0: Default (Email)<br>• 1: X500 DN<br>• 2: Address<br>• 3: Manual<br>• 4: Exchange Legacy DN<br>• 5: Transformed Lotus DN<br>• 6: NetBios User Name<br>• 100: IM<br>• 200: Bloomberg<br>• 300: Parlano |
| **dateCreated** | String | The date and time the alias was created. |

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## GET: Get User Using Address (getUserUsingAddress)

Retrieve information for a user by specifying the user's primary email address.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **userAddress** | String | Specify the primary email address associated with the user in ZL UA. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the specified user are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## GET: Get User Using Alias Address (getUserUsingAliasAddress)

Retrieve information for a user by specifying an alias assigned to the user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **aliasAddress** | String | Specify an alias assigned to the user in ZL UA. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the specified user are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## GET: Get User Using External Reference (getUserUsingExternalReference)

Retrieve information for a user by specifying the external reference data assigned to the user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **extReference** | String | Specify the external reference data assigned to the user in ZL UA. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the specified user are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## GET: Get User Using Owner (getUserUsingOwner)

Retrieve information for a user by specifying the owner assigned to the user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **owner** | String | Specify the name of the owner assigned to the user in ZL UA. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the specified user are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## GET: Get User Using ZLP ID (getUserUsingId)

Retrieve information for a user by specifying the ZLP ID assigned to the user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZLP user ID assigned to the user in ZL UA. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the specified user are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## PUT: Move User to a New Department (moveUserToNewDepartment)

Move a user to a new department or review department.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to move. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **newDeptInfoId** | Integer | Specify the ID of the department you want to move the user to. The REST API includes several endpoints you can use to retrieve department ID values. For further details on these endpoints, refer to *UAA/Departments* on page 97 |
| **newReviewDeptInfoId** | Integer | Specify the ID of the review department you want to assign the user to. The REST API includes several endpoints you can use to retrieve department ID values. For further details on these endpoints, refer to *UAA/Departments* on page 97 |

### Response Schema Fields

The response schema fields returned for the user who is being moved are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## PUT: Remove User Alias (removeAlias)

Remove a user alias.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to modify. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **alias** | String | Specify the alias you want to remove. |

### Request Body Schema Fields

None.

### Response Schema Fields

A string indicating whether the alias was removed successfully.

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## PUT: Restore Terminated User (restoreTerminatedUser)

Restore a terminated user to active status.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to restore. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **restoreAddress** | Boolean | Set to True to restore the primary email address previously assigned to the user. If desired, you can update the user's primary email address with the PUT: Update User Email Address endpoint descried on page 472. |
| **restoreAvailableAliases** | Boolean | Set to True to restore the aliases previously assigned to the user. |

### Response Schema Fields

The response schema fields returned for the user being restored are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## PUT: Terminate User (terminateUser)

Terminate an active user.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to terminate. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the user being terminated are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## PUT: Update User Account Information (updateUserAccountInfo)

Update a user's account information.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to modify. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **externalReference** | String | Enter any unique IDs or information used outside of ZL UA that is relevant to the user here. |
| **userTags** | String | Specify any user tags to apply to the user. |
| **retentionTags** | String | Specify any retention tags to apply to the user. |
| **altReviewDepartment** | String | Specify the Alternative Review Department to add the user to. |
| **fullName** | String | The first and last name of the user. |
| **dateHired** | String | The date the user was hired. |
| **miscField1**<br>**miscField2** | String | Use these fields to enter any additional information required for the user. |

### Response Schema Fields

The response schema fields returned for the user being updated are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## PUT: Update User Email Address (updateUserEmailAddress)

Update a user's primary email address.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | Integer | Specify the ZL user ID of the user you want to modify. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **address** | String | Specify the new primary email address to assign to the user. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the user being updated are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## PUT: Update User Mail Server Information (updateUserMailServerInfo)

Update the mail server information associated with a user.

### Request Parameters

None.

### Request Body Schema Fields

| Schema Field | Type | Description |
|---|---|---|
| **zlpUserId** | String | Specify the ZL user ID of the user you want to modify. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **mailServerName** | String | Specify the mail server name for the user. |
| **mailStoreInfo** | String | Specify the mail store name for the user. |
| **connectUserId** | String | Specify the user ID required for the user to access the server. |
| **connectPassword** | String | Specify the password required for the user to access the server. |

### Response Schema Fields

The response schema fields returned for the user being updated are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## PUT: Update User Owner (updateUserOwnerField)

Update a user's owner. The user owner is meant to identify the user's manager or the user's creator.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | String | Specify the ZL user ID of the user you want to update. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **owner** | String | Specify the name of the new owner. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the user being updated are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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## PUT: Update User Sync Status (updateUserSyncExclude)

Update a user's user synchronization status. This determines whether the user will be modified during user synchronizations.

### Request Parameters

| Parameter | Type | Description |
|---|---|---|
| **zlpUserId** | String | Specify the ZL user ID of the user you want to update. UAA/Users includes several endpoints you can use to retrieve user configuration data, including the ZLP user ID. For example, you could use the *GET: Get All Department Users (getAllDepartmentUsers)* endpoint to retrieve user configuration data for all the users included in a specific department. |
| **fSyncExclude** | Boolean | Set to True to exclude the user from being updated during user LDAP user synchronizations. |

### Request Body Schema Fields

None.

### Response Schema Fields

The response schema fields returned for the user being updated are the same as those included in the response returned after creating a user. This includes the user's basic account information, as well as additional information such as the ZLP user ID assigned to the user. For descriptions of these fields, refer to *POST: Create User* on page 455.

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