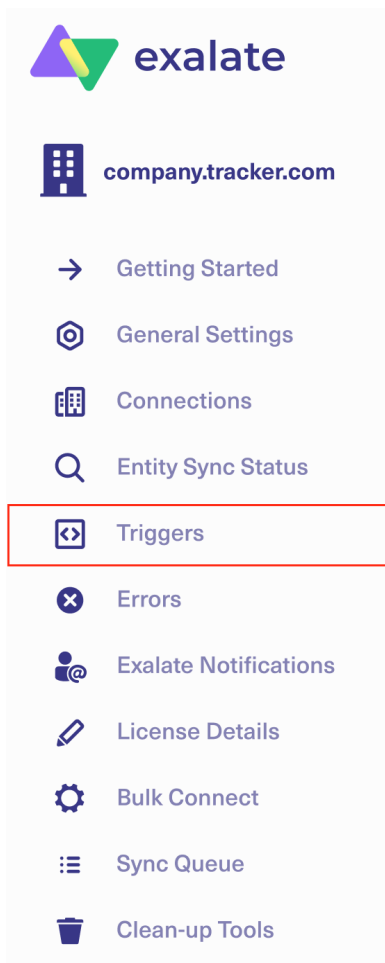# Triggers Operation

Last Modified on 03/18/2024 11:40 am EDT

Triggers in Exalate allow you to start synchronization automatically.

How to Create a Trigger

To create a trigger, please follow the steps:

1. Navigate to the **Triggers** tab in the Exalate admin menu

2. Click **Create Trigger**

3. Select the type of entity you want to synchronize. If there is only one option available, the dropdown feature is disabled.

> **Note**: If you want to synchronize multiple entities, you need to create separate triggers for every entity type.

4. In the **If** field, enter the desired filter to decide which issues get automatically synced to the other side.

Use the platform search syntax to specify the filter query.

Create Trigger

Specify a search query using GitHub advanced search syntax to synchronize issues automatically. All issues that fit the query will be triggered for synchronization. **Find more details.**

Trigger will apply to selected entity type* ⓘ

| issue | ∨ |

If*

Use GitHub advanced search syntax to specify the query. Make sure to include Github repo or org value. Check out our **documentation** for more details.

is:issue is:open label:bug repo:Exalate-team/test

Then sync with connection*

| Select a connection | ∨ |

Notes

☐ Activate trigger

Cancel   Create

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5. Select the Connection you want to sync with **Then sync with the connection** list.

6. Optionally, input information to keep a reference for the trigger in the **Notes** field.

7. Check the **Activate trigger** box to activate the trigger.

8. Click **Create** to complete the process.

> **Note**:
>
> - To start the synchronization you need to **Bulk Exalate** on the trigger. It helps to synchronize all issues that fit trigger search queries. For more inforamtion about this topic, please read how to bulk Exalate entities.
> - To stop the synchronization you need to **Bulk Unexalate** the trigger. It helps to stop the synchronization of all issues that fit trigger search queries. For more information

about this topic, please read how to bulk unexalate entities.

What if the connection used for a trigger has been disabled?

Whenever a connection used in a particular trigger is disabled, Exalate still collects all the changes which are related to issues that are under sync using that connection.

The changes are queued as sync requests. Once the connection is reenabled, sync transactions can continue from the point where they have been paused.

What if the trigger has been disabled?

Disabling the trigger makes Exalate ignore the create/update events for the issue that is matching the query.

Triggers in Jira

Create Trigger

Specify a JQL query to synchronize issues automatically. If the issue fits the query, it will be synced on the create/update issue event. **Find more details**.

Trigger will apply to selected entity type* ⓘ

issue ⌄

If ⓘ *

project = BLUE AND labels = sync

Then sync with connection*

Select a connection ⌄

Notes

Active?

✓○

Cancel   Create

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You can start issue synchronization automatically according to a specified search query with the help of a trigger.

If the issue fits a search query it is triggered for synchronization automatically. Once someone updates the issue which is under sync the changes are synchronized automatically.

Check the example of the Jira Query Language (JQL) trigger query below.

When you create an issue in **project = BLUE** with **labels = sync** issue is synchronized automatically.

Also, the same trigger starts the synchronization if any issue in **project BLUE** has been updated with **label sync.**

```
project = BLUE AND labels = sync
```

Using saved filters:

- You can use JQL saved filters in trigger configuration. Please make sure that the filter is shared with the proxy user.
- Filters can be shared with other users via user groups, projects, and project roles. They can also be shared globally. Any filter that is shared is visible to users who have the **Administer Jira** global permission.
- Use filter ID (***filter = 10500***) or name (***filter = "My filter"***) to configure a trigger

> **Note**: **Changes due to compliance with GDPR**
>
> JQL query containing user identifiers such as username, display name or email stop working starting from 29th of March due to Atlassian compliance with GDPR.
>
> Update your JQL query to use account IDs instead. Find more details in REST API migration guide and deprecation notice - userName and userKey. You can get the user account IDs with the help of JIRA Cloud REST API.
>
> Examples:
>
> JQL with userNames
>
> ```
> issuetype = Bug AND assignee in (mia) AND reporter in (alana) order by lastViewed DESC
> ```
>
> JQL with account IDs
>
> ```
> issuetype = Bug AND assignee in (abcde-  12345  ) AND reporter in (abc551-c4e99) order by lastViewed DESC
> ```

Triggers in Azure DevOps

Create Trigger

Specify a search query using Azure DevOps advanced search syntax to synchronize work items automatically. All entities that fit the query will be triggered for synchronization. **Find more details**.

Trigger will apply to selected entity type* ⓘ

| Work Item | ⌄ |

If*

Use Azure DevOps advanced search syntax to filter work items for synchronization.

```
[Work Item Type] = 'Task' and System.TeamProject = 'ProjectName'
```

Then sync with connection*

| Select a connection | ⌄ |

Notes

☐ **Activate trigger**

Cancel   Create

Triggers use a WIQL (Work Item Query Language) or the Azure DevOps Search Syntax to search Azure DevOps work items.

Use the Work Item Query Language Syntax to create a search query.

You only need the conditions found in the WHERE clause of the WIQL to filter the work items. Check some examples below:

Synchronize all work items with type 'Task' from a project 'ProjectName'

```
[Work Item Type] = 'Task' AND System.TeamProject = 'ProjectName'
```

Important: Starting from Exalate for Azure DevOps version 5.4.0 make sure to indicate the project name as `System.TeamProject = 'ProjectName'`

Sync work items from project 'BatCave' with type 'Task', assignee 'Bruce Wayne', and status 'Doing'

```
[Work Item Type] = 'Task' AND
[Team Project] = 'BatCave' AND
[System.AssignedTo] = 'Bruce Wayne' AND
State = 'Doing' AND
[Area Path] = 'BatCave\Operation' AND
[System.Tags] Contains 'azure'
```

Sync all work items that have a custom field with the title 'MyCustomTextField' and value 'Sonic'

[Custom.MyCustomTextField] = 'Sonic'

Sync all work items created 2 days ago

[System.CreatedDate] = @ today- 2

> **Note:** You can specify either the reference name or the friendly name. The following examples are valid WIQL syntax:
>
> - Reference name with spaces: [System.AssignedTo]
> - Friendly name with spaces: [Assigned To]
>
> Names without spaces don't require square brackets: ID, Title, State

Triggers in GitHub

Create Trigger

Specify a search query using GitHub advanced search syntax to synchronize issues automatically. All issues that fit the query will be triggered for synchronization. **Find more details.**

Trigger will apply to selected entity type* ⓘ

```
issue                          ⌄
```

If*

Use GitHub advanced search syntax to specify the query. Make sure to include Github repo or org value. Check out our **documentation** for more details.

```
is:issue is:open label:bug repo:Exalate-team/test
```

Then sync with connection*

```
Select a connection    ⌄
```

Notes

```

```

☐ **Activate trigger**

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Use the GitHub advanced search syntax to specify the query.

Warning: In order for the trigger to be saved you MUST specify at least one repository or organization in the search query. If you do not do this, it is still possible to save the trigger, but it doesn't work. This is a known issue and we are working to address it so a warning is displayed. Here are some examples of the queries to add:

is:issue org:Organization

is:issue is:open label:bug repo:username/test

is:pr is:open repo:username/test

Below you can see some more examples to specify in the query:

Synchronize issues in status Open with label bug from the repo test

is:open label:bug repo:username/test

Synchronize pull requests in status Open

is:pr is:open

Note: If the search query contains whitespaces you need to surround it with quotation marks. Check the example below:

Synchronize issues with a label bug fix

label:"bug fix"

Synchronize pull requests in status in progress

is: "in progress"

Triggers in Zendesk

Create Trigger

Specify a Zendesk search query to synchronize tickets automatically. All tickets that fit the query will be triggered for synchronization. **Find more details.**

Trigger will apply to selected entity type* ⓘ

ticket ⌄

If*

Use Zendesk search syntax to filter tickets for synchronization.

type:ticket status:open

Then sync with connection*

Select a connection ⌄

Notes

☐ Activate trigger

Cancel   Create

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Use the Zendesk search syntax to specify the filter query. Below you can see an example

Zendesk search: sync issues of type ticket with status open

type:ticket status:open

Sync tickets with ticket type INCIDENT and priority Urgent

type:ticket ticket_type:incident priority:urgent

Triggers in ServiceNow

Create Trigger

Specify a Servicenow search query to synchronize entities automatically. All entities that fit the query will be triggered for synchronization. **Find more details.**

Trigger will apply to selected entity type* ⓘ

incident ▾

If*
Use search ServiceNow search syntax to filter issues for synchronization.

urgency=1

Then sync with connection*

Select a connection ▾

Notes

☐ Activate trigger

Cancel   Create

Use the ServiceNow search syntax to specify the filter query. Below you can see an example

Servicenow search: sync incidents with urgency 1-High

urgency=1

Sync incidents that include "Test" in the description

short_descriptionLIKETest

Triggers in Salesforce

Create Trigger

Specify a search query using Salesforce advanced search syntax to synchronize entities automatically. All entities that fit the query will be triggered for synchronization. **Find more details**.

Trigger will apply to selected entity type* ⓘ

Opportunity ⌄

Use search query ✔️⚪

If

Use Salesforce advanced search syntax to filter entities for synchronization.

```
Name = 'MyName'
```

Then sync with connection*

Select a connection ⌄

Notes

☐ **Activate trigger**

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Warning: Currently, it is not possible to create a trigger using a query with text area fields. Text area fields contain text that can be longer than 4000 bytes. Unlike string fields, text area fields cannot be specified in the WHERE clause of a queryString of a query() call. For more information on the limitation, please read Field Types.

In Salesforce you can select conditions to filter an object for synchronization. Depending on the entity type selected you see different input fields.

Create Trigger

Specify a search query using Salesforce advanced search syntax to synchronize entities automatically. All entities that fit the query will be triggered for synchronization. **Find more details.**

Trigger will apply to selected entity type* ⓘ

| Opportunity | ⌄ |

Use search query ⬤ ✕				
Select conditions to filter Opportunity for synchronization:				
Name	**Description**	**Quantity**	**Next Step**	
Name ⊗	Description ⊗	Quantity ⊗	Next Step ⊗	More ⌄

Note: Alternatively, you can enable **search queries**. Use Salesforce Object Query Language to specify the filter query.

| **Use search query** ✓⬤ |
| **If** ⓘ |
| StageName = 'Prospecting' |

Please, read the following search query examples for Opportunity:

| StageName= 'Prospecting' AND Name like '%demo%' |

This search query defines the Opportunity stage as 'Prospecting' and an Opportunity name that partially matches the word 'demo'

This search query defines an Opportunity's exact name as 'demo opportunity' and its order number - 123

Triggers in HP ALM/QC

Warning: We are moving Exalate for HP QC/ALM into basic maintenance mode. This transition period will last until November 2024, after which support will be halted completely. For more information, please see https://exalate.com/blog/end-of-support-hp/.

To specify the filter query, use the formatting allowed by the HP ALM REST API. For more information, please read Filtering a Collection of Entities.

Sync only defects that are in status Open

| status[Open] |

Sync only defects that have user field 03 not empty

| user-03[<>''] |

Sync only defects that have user field 03 not empty and the status 'New' or 'Open'

```
user-03[<>''];status[New or Open]
```

Sync only test cases which are in status Repair

```
status[='Repair']
```

Sync only test cases in which ID is above one and the status is Ready or Design

```
id[>1]; status[Ready or Design]
```

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