

Click 'Admin Panel' > 'Manage' > 'Ticket Filters'

- Ticket filters are rules which implement specific actions on tickets if certain criteria are met.
- Actions include routing tickets to a specific department/admin/staff member, sending an auto-response, closing/rejecting a ticket, changing the ticket owner, and more.
- Once saved and made active, the filter is applied to all new tickets received by your organization.
- You can create multiple filters and prioritize them with the 'execution order' setting. Filters with a higher execution order take precedence in the event of a conflict.

Examples:

1. Identify tickets with device names starting with 'Desktop'. Change the users on those tickets to a specific user. For example, to the network admin.
2. Assign tickets that were auto-created by Endpoint Manager to a specific staff member.

Click the links below for help with each aspect of ticket filters:

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## The ticket filters interface

- Login to ITarian
- Click 'Applications' > 'Service Desk'
- Open the 'Admin Panel' (see the last link on the left)
- Click 'Manage' > 'Ticket Filters'

<input type="checkbox"/>	NAME	STATUS	ORDER	RULES	TARGET	DATE ADDED	LAST UPDATED
<input type="checkbox"/>	<a href="#">Issues with overheating problems</a>	Active	5	1	Any	02/11/2020 12:29 pm	02/11/2020 12:29 pm
<input type="checkbox"/>	<a href="#">Printer problems</a>	Active	10	1	Any	02/11/2020 12:30 pm	02/11/2020 12:30 pm
<input type="checkbox"/>	<a href="#">Network connectivity</a>	Active	3	1	Any	02/11/2020 12:32 pm	02/11/2020 12:32 pm

- **Name** - The label of the ticket filter
- **Status** - Whether the filter is enabled or disabled
- **Order** - The priority that the filter is executed
- **Rules** - The number of rules in the filter
- **Target** - The channel over which the ticket is received. You can select 'Any', or pick a specific channel like 'Email', 'Web' or 'API'.
- **Date Added** - Date and time the filter was created
- **Last Updated** - Date and time the filter was most recently edited.

## Create a new filter

- Open the 'Admin Panel' (See the last link on the left)
- Click 'Manage' > 'Ticket Filters'
- Click 'Add New Filter'

Service Desk > Manage > Ticket Filters

Enable
  Disable

<input type="checkbox"/>	NAME ↕	STATUS ↕	ORDER ↕	RULES ↕	TARGET ↕
<input checked="" type="checkbox"/>	<a href="#">Issues with overheating problems</a>	Active	5	1	Any
<input type="checkbox"/>	<a href="#">Printer problems</a>	Active	10	1	Any
<input type="checkbox"/>	<a href="#">Network connectivity</a>	Active	3	1	Any

### Add New Filter

**Category Information:** Filters are executed based on execution order. Filter can target specific ticket source.

Filter Name: \*

Execution Order: \*  (1...99)  Stop processing further on match! ?

Filter Status: \*  Active  Disabled

Target Channel: \*  ?

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**Filter Rules:** Rules are applied based on the criteria. ?

Rules Matching  Match  Match Any (case-insensitive comparison) ? [Add New Rule](#)

Criteria: \* All

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**Filter Actions:** Can be overridden by other filters depending on processing order.

The new filter form contains the following sections:

- [Category information](#)
- [Filter rules](#)
- [Filter actions](#)
- [Admin notes](#)

### Category information

- **Filter Name:** Enter a unique label for the filter. The name should identify the purpose of the filter.

- **Execution Order:** The priority of the filter. The lower the number, the higher the priority.
  - Filters are prioritized according to their execution order. If a ticket meets the conditions of multiple filters, and these conditions conflict with each other, then the filter with the higher execution order is implemented.
  - Stop processing further on match! - [Service Desk](#) will apply the actions in this filter when it finds a ticket which meets its conditions, then ignore any other filters which match the ticket.

For example, say you have two filters which state different actions for tickets received from 'example@example.com':

Filter A - IF user / email address EQUALS 'example@example.com', THEN assign to 'Maintenance' dept.  
Execution order = 1

Filter B - IF user / email address EQUALS 'example@example.com', THEN send 'Canned response'.  
Execution order = 2

Actions are applied in this order to the tickets received from 'example@example.com':

1. The ticket is assigned to 'Maintenance' dept
2. A canned response is sent

If 'Stop processing further on match!' is enabled in filter A then the ticket is assigned to maintenance, but the canned response is not sent.

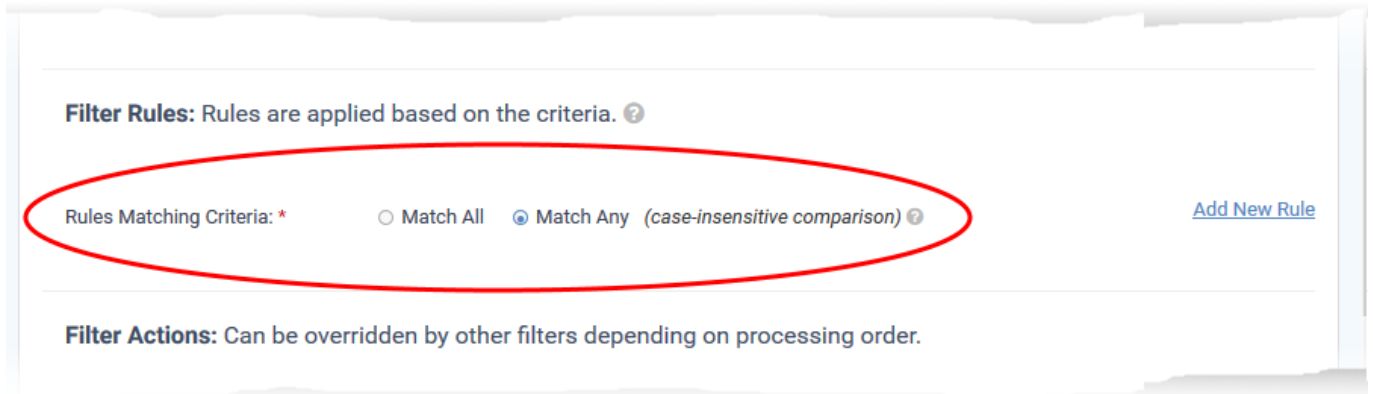
- **Filter Status:** Select whether you want the filter to be active or inactive by default. You can change the filter status at anytime using the 'Enable'/'Disable' buttons in the ticket filter screen. See [Activate / deactivate filters](#) for help with this.
- **Target Channel:** The method by which you received the ticket. For example, over email, via the service desk support website, over the phone, or auto-generated by Endpoint Manager. Service Desk will only apply the rule to tickets received over this channel.

## Filter rules

- Each rule has a search condition and a search criteria.
- You can add multiple rules to a filter, and choose to apply the filter if all rules are met, or if any one of the rules is met.

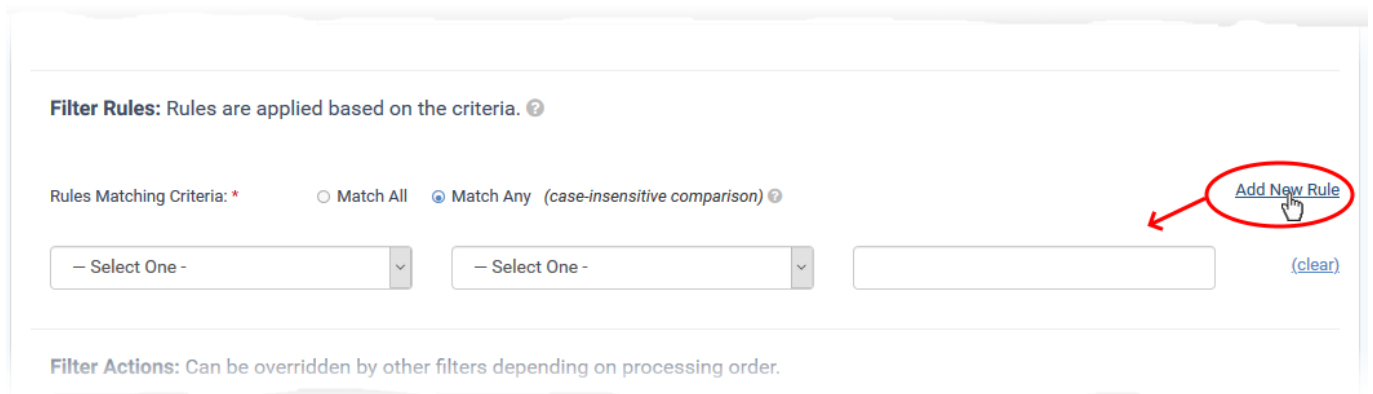
**Match All** – Applies the filter if every rule is met

**Match Any** – Applies the filter if any single rule is met



## Add rules

- Click 'Add New Rule' on the left



- Define a search rule in the following format:  
  
    <Search Parameter> <operator> <Search Criteria>
- Choose the search parameter from the first drop-down. For example, you can search for tickets from specific email addresses or domains, or by their priority level or category.
- Select the operator from the second drop-down (Equal, Not Equal, Starts With, etc)
- Type the search criteria in the text field. What you type here depends on the search parameter you picked in the first drop-down. For example, it could be an email address, customer name, user, ticket category etc.
- The rule in the following screenshot will catch all tickets which contain a 'Device Name' that starts with 'DESKTOP':

**Filter Rules:** Rules are applied based on the criteria. ?

Rules Matching Criteria: \*  Match  Match Any (case-insensitive comparison) ? [Add New Rule](#)

Ticket / Device Name  Starts With  DESKTOP [\(clear\)](#)

**Filter Actions:** Can be overridden by other filters depending on processing order.

- Repeat the process to add more rules to the filter

## Filter actions

Actions are the processes you want to implement when a ticket meets the conditions of the filter.

Criteria: \* All

**Filter Actions:** Can be overridden by other filters depending on processing order.

Reject Ticket:  Reject Ticket ?

Reply-To Email:  Use Reply-To Email (if available) ?

Ticket auto-response:  Disable auto-response. ?

Canned Response:  ?

Department: \*  ?

Priority: \*  ?

SLA Plan: \*  ?

Auto Close:  Auto Close ?

Auto Change User:  ?

Auto-assign To:  ?

Category:  ?

Admin Notes: Int...

The available actions are:

- **Reject Ticket:** The ticket is not accepted and not added to Service Desk. Your support team will not work on it.
- **Reply-To Email:** An automatic response is sent to the email address from which the ticket was generated. This applies only if the ticket source is 'Email'.
- **Ticket auto-response:** If selected, auto-response mails are disabled. The setting here overrides the auto-response settings of the department to which the ticket is assigned.
  - See [this wiki](#) to read more about auto-response settings
- **Canned Response:** Automatically send a preset reply to the user.
  - See [this wiki](#) to read more about canned responses
- **Department:** Assign the ticket to a particular department.
- **Priority:** Assign a certain priority level to the ticket. The options are Low, Normal, High and Critical.
  - See [this page](#) to read more about priority levels.
- **SLA Plan:** Apply a preset service level agreement to the ticket.
  - See [this wiki](#) to read more on SLA's
- **Auto Close:** Closes the ticket. The status of the ticket changes to 'Closed' in the 'Tickets' interface.
- **Auto Change User:** Set the ticket owner to a specific user. All further correspondence will be with the new user.
- **Auto-assign To:** Assign the ticket to a selected member of staff or admin.
- **Category:** Place the ticket into a particular category.
  - See [this wiki](#) to read more on ticket categories

## Admin notes

- Add any comments you have about the filter.
- Click the 'Add Filter' button at the bottom to save your new filter.

## Activate / Deactivate a filter

You can enable or disable a filter at anytime from the 'Ticket Filters' interface

- Open the 'Admin Panel' (See the last link on the left)
- Click 'Manage' > 'Ticket Filters'

- Select the filters
- Use the 'Enable' or 'Disable' links at the top to switch the filter between 'Active' and 'Inactive' states

<input type="checkbox"/>	NAME ↕	STATUS ↕	ORDER ↕	RULES ↕	TARGET ↕
<input checked="" type="checkbox"/>	<a href="#">Issues with overheating problems</a>	Active	5	1	Any
<input type="checkbox"/>	<a href="#">Printer problems</a>	Active	10	1	Any
<input type="checkbox"/>	<a href="#">Network connectivity</a>	Active	3	1	Any
<input type="checkbox"/>	<a href="#">Desktop issues</a>	Passive	6	1	Any

**Please Confirm** ✕

Are you sure want to **disable** selected filters?  
Please confirm to continue.

- Click 'Yes, Do it!' to confirm your selection

### Edit a filter

- Open the 'Admin Panel' (See the last link on the left)
- Click 'Manage' > 'Ticket Filters'
- Click on a ticket filter name in the list.

The 'Update Filter' screen lets you edit the filter configuration as required. The update procedure is same as explained [above](#).

### Remove a filter

- Open the 'Admin Panel' (See the last link on the left)
- Click 'Manage' > 'Ticket Filters'
- Select the check box beside the ticket filters that you want to remove
- Click the 'Delete' link at the top



Service Desk > Manage > Ticket Filters

+ Add New Filter   ✓ Enable   ⚙ Disable   🗑 Delete

<input type="checkbox"/>	NAME ↕	STATUS ↕	ORDER ↕	RULES ↕	TARGET ↕
<input checked="" type="checkbox"/>	Issues with overheating problems	Active	5	1	Any
<input type="checkbox"/>	Printer problems	Active	10	1	Any
<input type="checkbox"/>	Network connectivity	Active	3	1	Any
<input type="checkbox"/>	Desktop issues	Passive	6	1	Any

**Please Confirm** ✕

**Are you sure you want to DELETE selected filters?**

Deleted filters CANNOT be recovered, including any associated rules.

Please confirm to continue.

- Click 'Yes, Do it!' to confirm removal