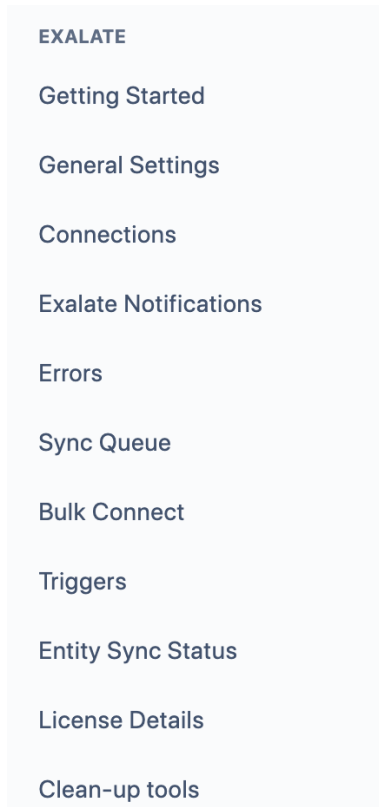


# Exalate Menu Panel

Last Modified on 03/13/2024 8:06 am EDT

Navigating through the Exalate Menu Panel is required for all the administrative tasks related to the Exalate application.



In case the Exalate App is not embedded in your task management system, you can reach it by directly accessing the [Exalate Node URL](#). The menu panel is located on the left side of the screen.

If you are using Exalate on Jira, Zendesk, or any other platform that supports the embedded Exalate version, you need first to access the Exalate app through the task management system interface. Once that is done you can find the Exalate Menu Panel on the left side of the screen.

The look and feel may show some differences depending on the task management system, but the options remain essentially the same.

## Getting Started

On the **Getting Started** screen, you find two useful options: **Book a Call with an Expert** and **Step-by-step Tutorials**. If you need help with a particular setup, or need more information on how to use Exalate, our team is here to help. The **Tutorials** button leads to the Exalate site, with step-by-step video instructions specifically for the platform you are using. The **User Documentation** link takes you to the Documentation portal.



To start a synchronization, you must install and configure Exalate on both sides.

[Book a Call with an Expert](#)

[Step-by-step Tutorials](#)

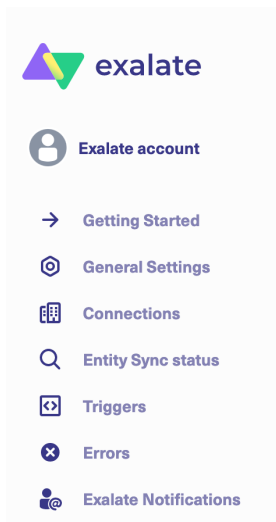
[Documentation](#) [EULA](#) [Support](#) [Report a bug](#)

Powered by Exalate v. 5.4.2 (Core v. 5.4.6)

## General Settings

The options within the **General Settings** vary depending on the platform you use. Please see below for specific options for your platform.

### Azure DevOps



#### General Settings

##### Exalate Url

<https://securemode-ecw-gott-fdq-url.exalate.at>

##### Azure DevOps URL

<https://dev.azure.com/YurikDmiOctober>


##### Organization

YurikDmiOctober

[Configure](#)

- **Exalate URL** - your Exalate node URL.
- **Azure DevOps URL** - a link that you use to access your Azure DevOps.
- **Organization** - the Azure DevOps organization used to install Exalate.
- **Configure** - Exalate proxy user personal access token configuration.

### GitHub



github.com

- Getting Started
- ⚙️ General Settings
- 📄 Connections
- 🔍 Entity Sync status
- 🔗 Triggers

## General Settings

### Exalate Url

https://githubnode-prf-qci-xxxx-xxxx.exalate.cloud

### Tracker Url

https://github.com


### Account

xxxxx

- **Exalate URL** - your Exalate node URL.
- **Tracker URL** - GitHub URL.
- **Account** - the GitHub account used to install Exalate.

## 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/>.



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- 👤 Exalate Administra...
- ✍️ License Details
- ⚙️ Bulk Connect
- ☰ Sync Queue
- 🗑️ Clean-up Tools

## Configure General Settings

HP ALM URL \*

https://hpalm-demo.exalate.net

Exalate URL \*

https://hpalm-demo-node.exalate.net

HP ALM user \*

admin

Password \*

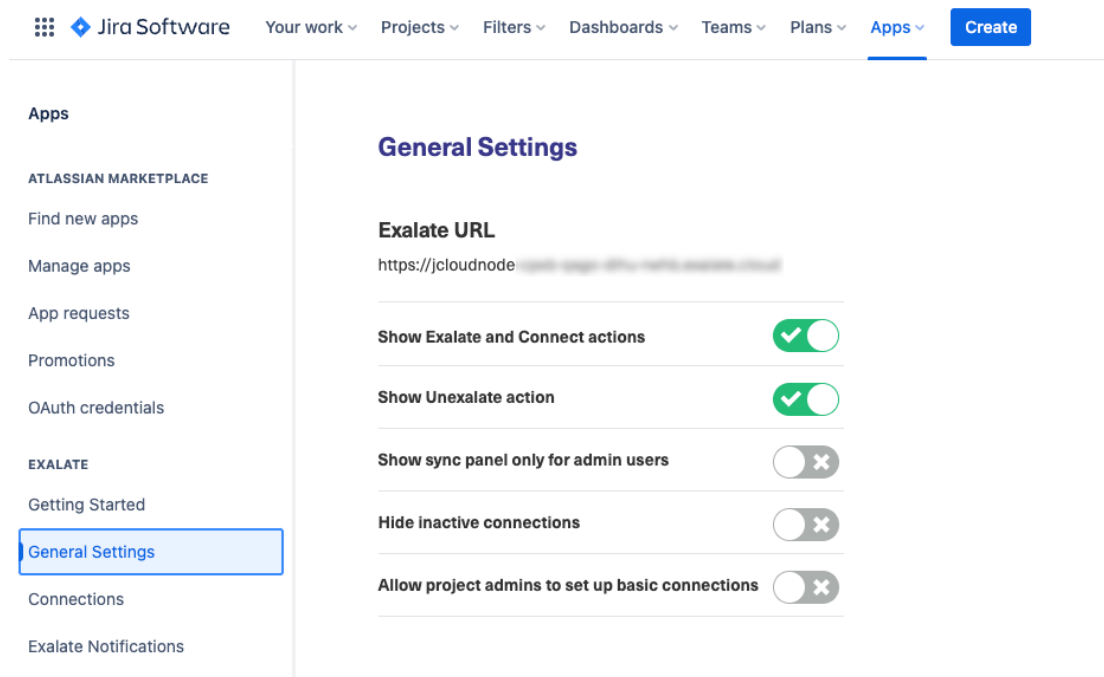
•••••

Do They need to know our HP ALM user / password ?



- **HP ALM URL** - a link to the HP ALM/QC instance without the /qcbn path.
- **Exalate URL** - your Exalate node URL.
- **HP ALM user**- a proxy user that is used by Exalate to communicate with HP ALM/QC.
- **Password** - a proxy user password.
- **Do they need to know our HP ALM user/password?** - a toggle that can be used to enable or disable required authentication. If you set the authentication as required, you need to share the credentials with the remote instance so that they can authenticate to your instance.

## Jira Cloud



The screenshot shows the Jira Cloud interface. At the top, there's a navigation bar with 'Jira Software' and various menu items like 'Your work', 'Projects', 'Filters', 'Dashboards', 'Teams', 'Plans', 'Apps', and a 'Create' button. On the left, a sidebar lists 'Apps' and 'EXALATE' options, with 'General Settings' highlighted. The main content area is titled 'General Settings' and contains the following settings:

- Exalate URL**: A text input field containing a URL starting with 'https://jcloudnode'.
- Show Exalate and Connect actions**: A toggle switch that is turned on (checked).
- Show Unexalate action**: A toggle switch that is turned on (checked).
- Show sync panel only for admin users**: A toggle switch that is turned off (unchecked).
- Hide inactive connections**: A toggle switch that is turned off (unchecked).
- Allow project admins to set up basic connections**: A toggle switch that is turned off (unchecked).

- **Exalate URL** - your Exalate node URL.
- **Show Exalate and Connect actions** - the toggle controls how the **Exalate** and **Connect** buttons are displayed on the issue view. If the toggle is active, the buttons are visible to the users on the issue view.
- **Show Unexalate action** - the toggle controls if the **Unexalate** button is visible on the issue view. If enabled, the users can see the Unexalate button in case the issue was previously Exalated.
- **Show sync panel only for admin users** - the toggle controls if the **Sync Panel** is displayed for all the users, or only for admin users.

**Note:** The [Sync panel](#) provides information on the connection and the current sync status directly on the issue view. You can also enable a remote issue link to be displayed there.

- **Hide inactive connections** - this toggle allows you to hide/show inactive connections in the

**Connections** tab.

- **Allow project admins to set up basic connections** - this toggle controls if the project admin users can initiate basic connections on the project level.

## Jira On-Premise

ATLASSIAN MARKETPLACE  
Find new apps  
Manage apps

EXALATE  
Getting Started  
General Settings  
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License Details  
Clean-up Tools  
Sync Queue

### General Settings

**Proxy User**  
JIRAUSER10000

**Email Notifications**  
ACTIVE

**In-JIRA Notifications**  
ACTIVE

**Authentication required**  
DEACTIVATED

**Polling interval (in seconds)**  
20

**Show Exalate and Connect actions**  
ACTIVE

**Show Unexalate action**  
DEACTIVATED

**Hide inactive connections**  
DEACTIVATED

Display URL

Configure

- **Proxy User**- a user that can carry out any changes such as creating issues, updating data, adding comments and attachments, etc. You can use an existing Jira user or create a new one.
- **Email Notifications** - use the toggle to enable/disable email notifications. If enabled, email notifications are sent once every hour.
- **In-Jira Notifications** - pop-up messages with confirmation of successful actions, alerts, errors, and other information related to Exalate.
- **Authentication required** - relevant only for Exalate v.3.x and lower. Toggle to enable or disable authentication to your instance and secure the connection. If you set the authentication as required, you need to share the credentials with the remote instance so that they can authenticate to your instance.
- **Polling Interval(in seconds)** - a time interval in seconds used to poll the destination instance in case of a Private - Public connection.
- **Show Exalate and Connect actions** - the toggle controls how the **Exalate** and **Connect** buttons are displayed on the issue view. If the toggle is active, the buttons are visible to the users on the issue view.
- **Show Unexalate action** - this toggle controls how the **Unexalate** button is visible on the issue view. If enabled, the users are to see the Unexalate button in case the issue was

previously Exalated.

- **Hide inactive connections** - this toggle allows you to hide/show inactive connections in the **Connections** tab.
- **Display URL** - your Jira URL.
- **Configure** - click the Configure button to adjust General Settings.

## Salesforce

The screenshot shows the 'General Settings' page for a Salesforce instance. On the left, there is a sidebar with the Exalate logo and a navigation menu. The 'General Settings' option is highlighted. The main content area displays the following information:

- Exalate Url:** `https://salesforcemede-4301-papn-gwaw-0fus.exalate.cloud`
- Tracker Url:** `https://idalko2-dev-ed.my.salesforce.com`
- A green **Configure** button is located below the Tracker Url.

- **Exalate URL** - your Exalate Node URL.
- **Tracker URL** - your Salesforce instance URL.
- **Configure** - here you can set or modify the **Organization type**, **Consumer Key**, and **Consumer Secret** information.

## ServiceNow

The screenshot shows the 'General Settings' page for a ServiceNow instance. On the left, there is a sidebar with the Exalate logo and a navigation menu. The 'General Settings' option is highlighted. The main content area displays the following information:

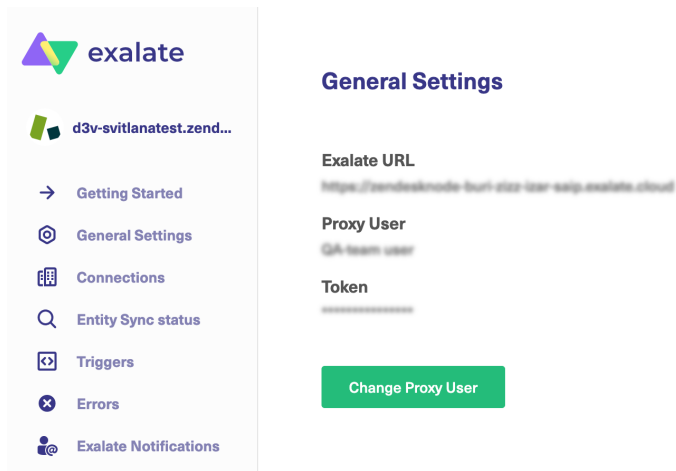
- Exalate Url:** `https://snownode-kstp-dbrd-jgly-mdnl.exalate.cloud`
- Tracker Url:** `https://dev12112.service-now.com/`
- Client ID:** `41c0a8a85d631*`
- Auth Protocol:** `token`
- Client Secret:** `.....`
- Refresh token:** `.....`
- A green **Configure** button is located below the Refresh token.

At the bottom right of the page, there is a footer with the following text: [Documentation](#) [EULA](#) [Support](#) [Report a bug](#)  
Powered by Exalate v. 5.4.9 (Core v. 5.4.9)

- **Exalate URL** - your Exalate Node URL.
- **Tracker URL** - your ServiceNow instance URL.
- **Client ID** - your ServiceNow Client ID.
- **Auth Protocol** - either Token or Basic auth.

- **Client Secret** - your ServiceNow Client Secret.
- **Refresh Token** - your [ServiceNow token](#).

## Zendesk



- **Exalate URL** - your Exalate node URL.
- **Proxy user**- a dedicated Zendesk agent. Exalate performs ticket changes on behalf of this user.
- **Token** - access token generated by the proxy user.
- **Change Proxy user** - this button allows you to change the current proxy user.

## Connections

You can find a list of all the created connections under the Connections tab. If you do not have any connections yet, this is the place where you can create and configure one.

Under the Connections tab you can find the following options:

- **Initiate Connection**: click this button to create a new connection.
- **Accept Invitation**: if the connection has been initiated from the other instance, you can Accept the connection invitation by clicking the corresponding button.
- **Refresh**: use the Refresh button to instantly refresh the connections screen without reloading the whole page.

## Connections

Connection defines synchronization behavior, including communication details, sync rules, and scope.

Initiate connection

Accept invitation



Connection	Issues under sync	Last sync	Status	
<b>Local_to_Local</b> For Cashe	12	BT-50 3 weeks ago	Active	
<b>Project_to_Name</b>	4	BT-77 4 days ago	Active	

< 1 >

**Note:** You can click on any of the column headers to sort, in ascending or descending order, **Connection types**, **Issues under sync**, **Last sync**, and **Status**.

Once you have established a connection, there are several available options available from the icons on the right side:

GitScript_to_AzureScript	9	issue 30 1 week ago	Active	
Jira9.4.0_to_GitHub	2		Active	

Deactivate

Delete connection

Exalate

- **Edit Connection:** This option allows you to modify the connection Sync Rules, add a trigger, view statistics, and general connection information, and add a connection description.
- **Deactivate:** Use this option to deactivate a connection. When you deactivate a connection, it stays in the connection list with the Deactivated status. You can activate it anytime by clicking the Activate button.
- **Delete Connection:** You can delete a connection from the connections list by clicking this button. When deleting a connection, the synchronization information as well as the configurations is removed. You can see a warning with the connection information and a confirmation screen whenever deleting a connection.
- **Exalate:** By clicking Exalate you can start the synchronization of a specific entity right away. Enter the entity key and click Exalate to proceed with the sync.

## Exalate Notifications

Under the **Exalate Notification** tab, you can add users to receive email notifications every time Exalate raises a synchronization error. Click **Create** to add a user's name and email to the list of notification recipients.



# Errors

Here you can find a list of errors when the synchronization is blocked. The errors can be related to a single issue error or a Connection-level error that blocks the entire Connection.

**Errors (1)**

Connection: All | Local Issue key: | Remote Issue key: | Filter | Clear Filter | Resolve all

Error	Impact	Occurred at
Incoming script error test Error line: 11	Relation Sync for connection %SortingZEN_to_Jcloud is blocked	Jun 19, 2023 06:47:44

Documentation EULA Support Report a bug  
Powered by Exalate v. 5.5.3 (Core v. 5.5.3-m20)

There could also be an instance-wide error that blocks all the Connections within that instance.

You can manage these errors and find the error details. Error overview includes an error summary description, its impact level, and the time when the error occurred.

Click the "... " to access the following options:

- **Error Details** : find out more information on every specific error.
- **Resolve and Retry**: start sync again once the error has been fixed.
- **Decrease Error Impact**: decreases the error impact level.
- **Ignore Related Sync**: ignores the error related to the sync.

**Note:** You can click on any of the column headers to sort, in ascending or descending order, **Error**, **Impact**, and **Occurred at**.

**Note:** For more information, please see [error handling](#).

## Sync Queues

The Exalate app provides a **Sync Queue** utility to monitor outgoing and incoming synchronization messages that are in progress. You can find it in the Exalate admin menu as a separate tab.


The tool stores data related to the synchronization that is under processing. You can also track attachment synchronization separately.

**Sync Queue** ↻

Connection:  Local Issue key:  Remote Issue key:  Filter Clear Filter

---

**Outgoing sync (0)** Incoming sync (0) Outgoing attachments (0) Incoming attachments (0)



**There are no outgoing synchronization messages being processed.**

[Documentation](#) [EULA](#) [Support](#) [Report a bug](#)  
 Powered by Exalate v. 5.4.10 (Core v. 5.4.10)

The Sync Queue can be filtered by **Connection name** or even a particular **Local** or **Remote** entity ID.

You can also click on any of the column headers to sort, in ascending or descending order, **ID**, **Event Number**, **Status**, **Connection**, **Sync type**, and **Twin trace ID**.

This can be really useful when there is a big amount of issues under synchronization and you need to find out the information on something specific.

**Sync Queue** ↻

Connection:  Local Issue key:  Remote Issue key:  Filter Clear Filter

---

**Outgoing sync (6)** Incoming sync (0) Outgoing attachments (0) Incoming attachments (0)

ID	Event number	Status	Connection	Local issue	Remote issue	Sync type	Priority	Twin trace ID	Action
436	1	WAITING_FOR_RESPONSE	github_to_Svitlana Blue (ACTIVE)	TEST-17		EXALATE	Low	210	...
439	1	WAITING_FOR_RESPONSE	github_to_Svitlana Blue (ACTIVE)	TEST-14		EXALATE	Low	213	...
440	1	WAITING_FOR_RESPONSE	github_to_Svitlana Blue (ACTIVE)	TEST-13		EXALATE	Low	214	...

The **Outgoing sync tab** displays **outgoing synchronization events** queued in the **In progress** status.

Exalate creates a *Sync Event* once the local issue has been updated. You can find all processing sync events under this tab.

**Sync Queue** ↻

Connection:  Local Issue key:  Remote Issue key:  Filter Clear Filter

---

**Outgoing sync (1)** Incoming sync (0) Outgoing attachments (0) Incoming attachments (0)

ID	Event number	Status	Connection	Local issue	Remote issue	Sync type	Priority	Twin trace ID	Action
436	1	WAITING_FOR_RESPONSE	github_to_Svitlana Blue (ACTIVE)	TEST-17		EXALATE	Low	210	...

The **Incoming sync tab** displays **incoming synchronization requests** queued in the **In progress**

status.

Exalate creates *Sync Request* once the remote issue was updated. You can see all processing sync requests under this tab.

ID	Remote event number	Status	Connection	Local issue	Remote issue	Sync type	Twin trace ID	Action
16963	2	UPDATE_ISSUE	Forsnow_to_ForZen (ACTIVE)	SN-801	FZ-2628	UPDATE	18217	***

**Outgoing attachments** display outgoing sync events of the attachments that are in progress.

**Incoming attachments** display incoming sync events of the attachments that are in progress.

## Usage

- Track all synchronizations that are under processing.
- When you use **Bulk Exalate** or **Bulk Connect** to sync a big amount of issues at a time you can track the synchronization progress.
- Troubleshooting: you can get details of the queued synchronization events or requests.

Usually, the support engineer requests data from the Sync Queue to get more context of an issue.

Below you can see an example of the outgoing sync event details

```
{
  "version": {"major": 1, "minor": 14, "patch": 0},
  "hubIssue": {"organization_id": "360022251939", "components": [], "attachments": [], "voters": [], "customFields": {}, "description": "some comment", "watchers": [], "fixVersions": [{"id": "268", "key": "268", "summary": "sync queue test", "creator": {"key": "360701091779", "active": false, "email": "svitlana@idalko.com", "displayName": "Svitlana Magamedova", "username": "Svitlana Magamedova"}, "comments": [{"internalMap": {"organization_id": "360022251939"}, "reporter": {"key": "360701091779", "active": false, "email": "svitlana@idalko.com", "displayName": "Svitlana Magamedova", "username": "Svitlana Magamedova"}, "priority": {"name": "normal"}, "labels": [], "customKeys": {}, "workLogs": [], "issueType": {"name": "task"}, "affectedVersions": [], "entityProperties": {"status": {"name": "new"}}, "issueUrl": "https://d3v-svitlanatest.zendesk.com/agent/tickets/268"}
}
```

## Bulk Connect

If you have an existing entity and you want to connect it with the existing entity on the other side,

you can use the **Bulk Connect** operation. Under this tab, you can upload a simple mapping file and sync a set of existing issues within just one operation.

To know more about how to perform this operation, please read the guide on [How to perform the Bulk Connect operation?](#)

## Bulk Connect

Synchronize existing entities with remote ones

### Connection\*

 | 

### Work item Mapping \*

 No file chosen

### > Advanced

## Triggers

Here you can configure automatic synchronization by creating triggers. Each trigger includes a search query with specific parameters. If the entity fits a search query it is triggered for synchronization automatically.

### Triggers

Entity type	If	When	Then sync via Connection	Status
Issue	issuetype = Task AND created <= 2023-06-01	Events: create/update	Local_to_Local	<input checked="" type="checkbox"/>
Issue	project = "TES" AND issuetype = Task AND created <= 2023-02-01	Events: create/update	Local_to_Local	<input type="checkbox"/>

**Note:** You can use the sorting feature to sort triggers in ascending or descending order by **Entity type**, **Then sync via Connection**, and **Status**. The sorting icon appears once you click on one of these headers.

For more information please see [how to create Triggers](#).

## Entity Sync Status

Under this tab, you can see the sync status of any entity and start synchronization. Enter an entity URN and click **Search** to find out the current status of this entity.

### Entity Sync status

The sync panel provides a view on the status of the entity, which is under synchronization. You can also find a remote entity link in there if it is available.

Select an entity type\* ⓘ

 | v

Entity Urn\* ⓘ



Search

If the entity is already under sync, you can **Unexalate** it from here. If the entity has not been synchronized yet, you can **Exalate** or **Connect** it by clicking the corresponding button.

To know more about the Entity Sync status on different platforms visit this [page](#).

## License Details

## License Details

Type	EVALUATION
Status	ACTIVE
Used synchronizations	0 out of 1000
Next synchronizations available on	2023-01-01
Valid until	2023-01-01
License key	eyJsaWNlbnNlVmVyc2lv...  

Here you can manage your Exalate license information, and read your license type, status, and expiration date.

## Clean-up Tools

Under this tab, you can stop synchronization and remove synchronization-related metadata on both sides. Usually, this tool is used to resolve unhandled synchronization problems. The two available options let you clean up by **Connection** or clean up by **Entity**.

Learn to [use the Clean-up Tools](#).

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