

Initiate a Connection for HP ALM/QC

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

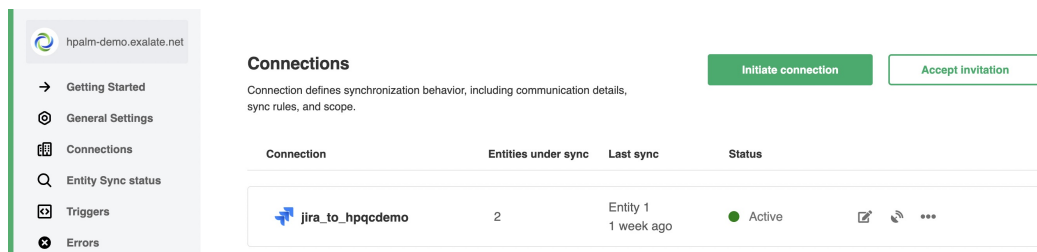
Note: Before you set up a Connection in Script mode ensure that:

- your instance is public.
- you are either in the Evaluation (trial) period or have a Paid license.

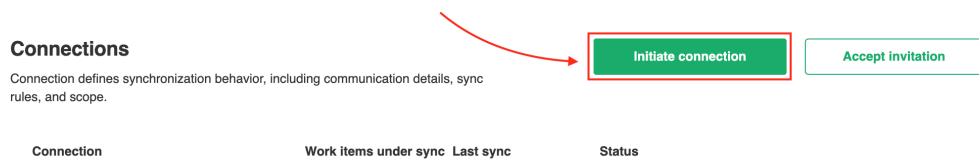
Initiate a Connection in Script Mode from HP ALM/ QC

Note: It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same. If you are initiating the connection you become the source and the other side becomes the destination.

1. Navigate to the **Connections** tab in the Exalate console.



2. Click **Initiate Connection**.



3. **Choose the type of the destination instance .**

Based on the type Exalate knows how to communicate with the Destination Instance.

You can synchronize with the following types of instances:

- **Public** - the destination instance which is in a public network and you can access it from your side.
- **Private** - the destination instance in a private network or behind the firewall and you cannot access it from your side.

The configuration depends on the connection type.

Choose Public and click **Next**.

Initiate connection

Choose the type of the destination instance

Public

An instance you can access and it's available in a public network.

Private

An instance you cannot access because it's behind a firewall or in a private network.

Next

4. Specify Connection information.

Destination instance URL - available only for public connections

Instance short names are used to name both sides of the synchronization. The connection name is based on the instances' short names.

Note: The connection name is limited to 255 characters.

The Connection information describes the following:

Field	Description
Local instance short name	A short name for your instance
Destination instance short name	A short name for the destination instance
Connection name	Name of the connection
Description	Description of the connection

Initiate connection

Connection information

Local instance short name*

Remote instance short name*

Connection name*

Description

Previous

Next

5. Click **Next**.

6. Choose the sync rules template.

Note: The connection between instances requires sync behavior configuration on both sides. Exalate generates default sync rules to synchronize basic issue fields. You can adapt the Sync Rules later.

Single Project:

Initiate connection

Single project to project synchronization

By default the following issue data will be synchronized: summary, description, comments, labels and attachments. Please select the domain and project where new defects will be created.

In what local domain do you want to create entities received from the other side?*

In what local project do you want to create entities received from the other side?*

Previous

Initiate

Or

Advanced:

Initiate connection

Exalate generates default sync rules to synchronize basic issue fields. You can adapt the sync rules only in edit connection mode.

Domain A*

Select Domain A

Project A*

Select project A

< Previous

Initiate

7. Click **Initiate**.

8. Click **Copy invitation code**.

You can send the invitation code to the destination instance admin

Initiate connection

Ensure that Exalate is **installed** on the destination side "jira"

On the "jira" side, you (or their application administrator) need to **Accept the Invitation**.

Use the following invitation code:

Copy invitation code

Done

Note: When the other side accepts your invitation your connection is activated. Refresh the **Connections** page to see the Connection status change.

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