Set up a Connection in Basic Mode for AzureDevOps

Connections in Basic mode have a set of **Sync Rules**, generated by Exalate. With a Basic connection, you can sync a basic set of work item data: summary, description, comments, attachments, and work item types.

All comments are synced as public comments.

> **Note**: You cannot modify **Sync Rules** in Basic Mode.

If you want to edit/delete Sync Rules, you can upgrade the connection to Visual Mode or Script Mode.

Set Up a Connection in Basic Mode from Azure DevOps

> **Note:** It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same.
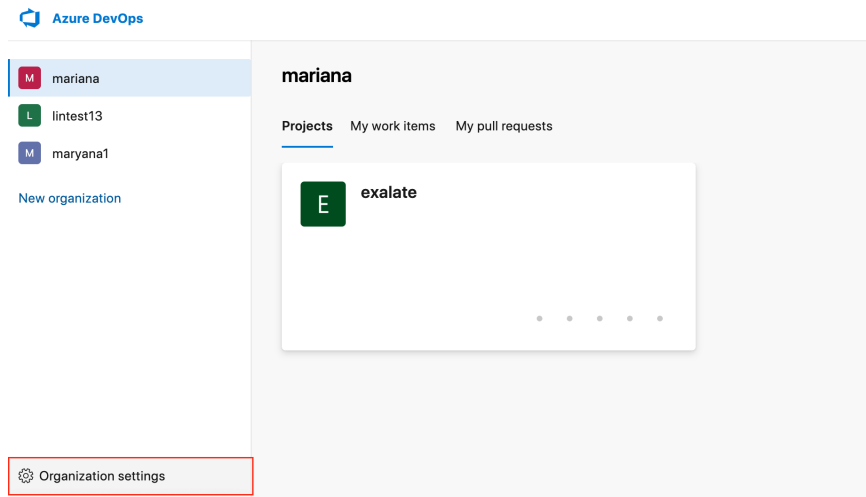
1. Navigate to the **Connections** tab in the Exalate console.

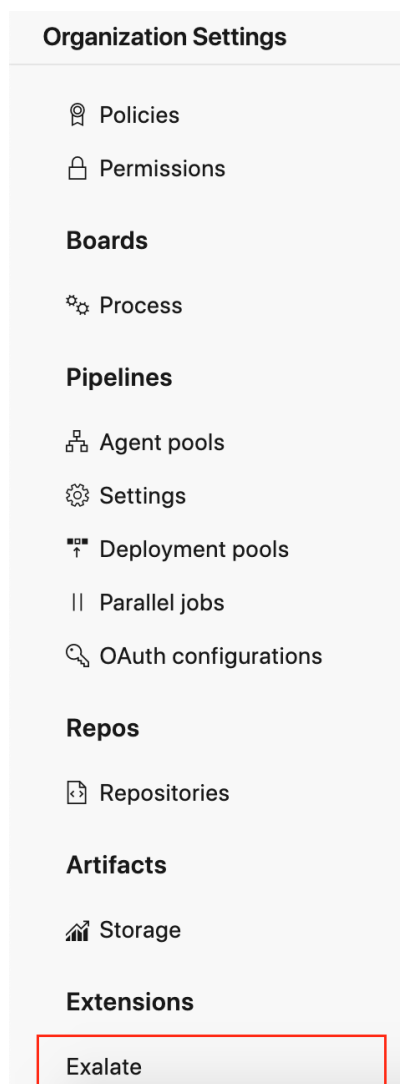> **Note**: You can also access Exalate with this link:
>
> ```
> https://dev.azure.com/{your_organization_name}/_settings/idalko-tools.exalate.adnode
> ```

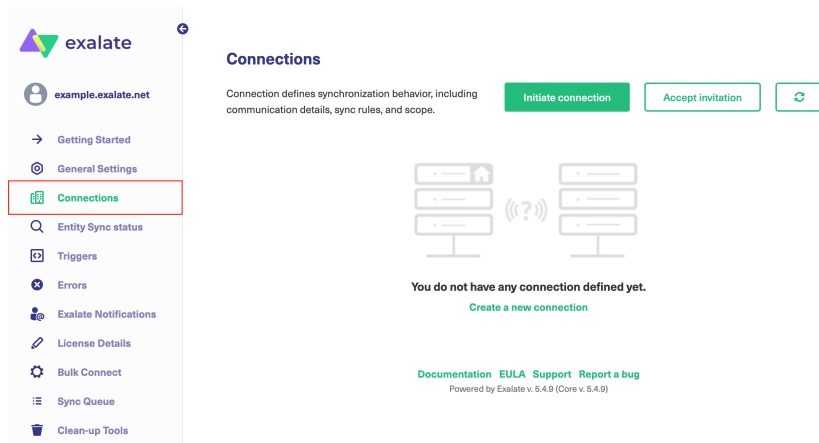To navigate to the **Connections** tab:
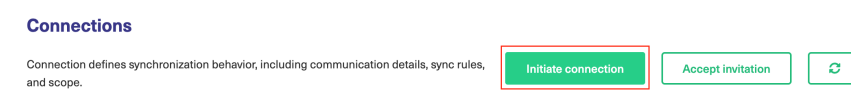
1. Click **Organization settings.**

2. Click **Exalate** in the **Extensions** section**.**

3. Click **Connections.**

2. Click **Initiate connection**.

3. Enter the **Destination Instance URL**.

The **Destination Instance URL** is the link to the instance you want to set up a connection with. You can directly enter the link of that instance or the **Exalate URL** from the **General Settings** tab in the Exalate admin panel**.**

Exalate suggests available Configuration Modes based on the destination instance.

4. Select **Basic**.

5. Click **Next**.

6. Select a project where you would like to sync entities received from the destination side.

7. Click **Next**.

8. Confirm if you have admin access to the destination instance.

Further steps are different if you have or don't have admin access to the destination instance.

- Select **Yes, I have admin access** if you have admin access to the destination instance. You aree redirected to the destination instance to establish a connection.
- Select **No, I don't have admin access** if you don't have admin access to the destination instance. You generate an invitation for the destination instance admin so they could establish a connection on their end.

Steps for: Yes, I have Admin Access

Click **Yes, I have admin access & Initiate** the connection. Click **Initiate.**

> **Note**: You are required to verify access on the destination instance. After which complete the following steps on the destination instance.

9. Select the project or repository where you want to sync entities.

> **Note**: Selecting the project or repository is not applicable to all platforms. In this case, the Connection is established after the previous step.

10. Click **Confirm**.

The Connection has been set up.

No, I don't have Admin Access

Click **No, I have admin access & Initiate** the connection.

9. Click **Copy invitation code**. You can send the invitation code to the destination instance admin.

10. Click **Done**, then complete the following steps on the destination instance.

11. Click on **Accept Invitation** under the **Connections** tab in the Exalate Admin Console in the destination instance and Paste the invitation code.

Accept Invitation ✕

Please paste the invitation code, received from your partner

Enter the invitation code

eyJpbnZpdGF0aW9uU2VjcmV0IjoiNUl2SnpGckZHZGhqZlNrVGlQb1NKN3pablp0clV3MWUiLCJpbnZpdGVkSW5zdGFuY2VVaWQiO
iJmMDYwYmE2Yy0xNTg5LTQxNDUtYTk2MS03MGIzNWUyMjgzZjQiLCJub2RlSW5mbyI6eyJuYW1lIjoibmFib28iLCJiYXNlVXJsIjoiaH
R0cHM6Ly9qY2xvdWRub2RlLWxxZ2Ytb3Zzei14c250LXFicmEuZXhhbGF0ZS5jbG91ZCIsImlzc3VlVHJhY2tlclVybCI6Imh0dHBzOi8v
bmFib28uYXRsYXNzaWFuLm5ldCIsIm5vZGVUeXBlIjoiSklSQV9DTE9VRCIsImlzc3VlVHJhY2tlclZlcnNpb24iOiI3LjAuMCIsIm5vZGVB
cHBWZXJzaW9uIjoiNy4wLjAiLCJub2RlVmVyc2lvbiI6IjUuMy4zIiwiZXhhbGF0ZVBsdWdpblZlcnNpb24iOiI1LjMuMyIsIm1pbkh1Yk9ia
mVjdHNWZXJzaW9uIjoiMS4yLjAiLCJtYXhIdWJPYmplY3RzVmVyc2lvbiI6IjEuMTQuMCIsIm1pblJlc3RWZXJzaW9uIjoiMS4wLjAiLCJtY
XhSZXN0VmVyc2lvbiI6IjUuMi4wIiwicG9sbE9ubHkiOmZhbHNlLCJleGFsb21wVmVyc2lvbiI6IjUuMy40IiwicmF3RXhhQ29tcFZlcnNp
b24iOiI1LjMuNCIsImluc3RhbmNlVWlkIjoiODdiZWE2MWItYTk2Mi00YjdiLWI1NzUtZjE5MDRiOGU0ZDA3IiwiZWRpdG9yIjp7ImFkb
WluUHJvb2ZVcmxUZW1wbGF0ZSI6Imh0dHBzOi8vbmFib28uYXRsYXNzaWFuLm5ldC9sb2dpbj9yZWRpcmVjdENvdW50XHUwMD
NkMVx1MDAyNmRlc3QtdXJsXHUwMDNkaHR0cHMlM0ElMkYlMkZuYWJvby5hdGxhc3NpYW4ubmV0JTJGcGx1Z2lucyUyRnNlcn...

Next

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12. Click **Next**.

13. Select the project where you want to sync issues.

> **Note**: Selecting the project or repository is not applicable to all platforms. In this case, the Connection is established after the previous step.

Accept invitation ✕

Select a project for the incoming sync

After accepting an invitation for a Basic mode connection, Exalate will be able to sync basic issue fields. The sync rules cannot be updated. Exalate will sync the following issue data: summary, description, comments, and attachments.

Issue types are mirrored. This means that tasks will be synced as tasks, bugs as bugs, and improvements as improvements. If an issue type is not included in the basic set, it will be synced as a task.

Please select the project where you want to create entities, received from the other side.*
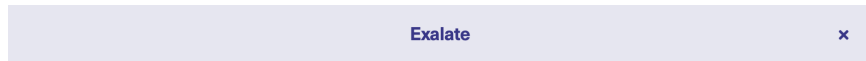
[Select Project   ⌄]

‹ Previous   Confirm

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14. Click **Confirm**.

The Connection has been set up.

Connection established successfully ✔

Sync your first issue to see how it works.

Please enter an issue key from the project **Test (TEST)** to proceed

TEST-1

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