Set up a Connection in Basic Mode for ServiceNow

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Connections in Basic mode have a set of **Sync Rules**, generated by Exalate. In Basic connections, you can only sync incidents. 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.

Initiate a Connection in Basic Mode from ServiceNow

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.

	exalate (-
		Connections
0	example.exalate.net	Connection defines synchronization behavior, including Initiate connection Accept invitation Communication details, sync rules, and scope.
\rightarrow	Getting Started	
۲	General Settings	
0	Connections	
Q	Entity Sync status	
Ø	Triggers	
8	Errors	You do not have any connection defined yet.
	Exalate Notifications	Create a new connection
0	License Details	
0	Bulk Connect	Documentation EULA Support Report a bug
:=	Sync Queue	Powered by Exalate v. 5.4.9 (Core v. 5.4.9)
Ť	Clean-up Tools	

2. Click Initiate connection.

Connections			
Connection defines synchronization behavior, including communication details, sync rules, and scope.	Initiate connection	Accept invitation	3

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. **Note**: If you enter the URL of your own instance here, Exalate determines it's a local connection between 2 projects within your instance.

	Initiate	connection		×
Destination instance URL			l don't have a UR	L 🔨
				Next

Exalate suggests available Configuration Modes based on the destination instance.

4. Select **Basic**.

	Initiate connection	×
Destination instance URL ① https://example.exalate.com		I don't have a URL
Choose the configuration type Easic Automatic configuration of basic fields Sync rules cannot be edited Only Issues can be synced Recommended for use cases of basic complexity	 BETA Visual Low-code, visual interface Configure both sides of the connection using a single interface Recommended for use cases of basic to intermediate complexity 	 Script Groovy-based scripting Configure each side of the connection separately Recommended for use cases of basic to advanced complexity

5. Click Next.

6. 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 are 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.

Initiate co	nnection	>
Do you have admin access to the destination instance?		
• You will be redirected to the destination instance to establish the connection	 No, I don't have admin access You will generate an invitation and send it to the destination instance admin to establish the connection 	
Previous	Initia	

Steps for: Yes, I have Admin Access

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

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

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

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

ction, Exalate will be able to sync basic issue fields. The sync rules cannot immary, description, comments, and attachments. e synced as tasks, bugs as bugs, and improvements as improvements. If a nced as a task.
immary, description, comments, and attachments. e synced as tasks, bugs as bugs, and improvements as improvements. If a nced as a task.
nced as a task.
entities, received from the other side.*
Con

9. Click **Confirm**.

The Connection has been set up.

Exalate	×
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	
TEST-T	
	Exalate

Steps for: 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.

Initiate connection	×
On the "company B" side, you (or their application administrator) need to Accept the Invitation. Use the following invitation code: Copy invitation code	
	Done

10. Click **Done**.



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

MDYwYmE2Yy0xNTg5LTQxNDUtYTk2MS03MGIzNWUyMjgzZjQiLCJub2RISW5mbyl6eyJuYW1IIjoibmFib28iLCJiYXNIV. HM6Ly9qY2xvdWRub2RILWxx2ZYlb3Zzei14c250LXFicmEuzXhhbGF0Z55jbG912ClsImtc3VIVHJNY2ticl/ybCl6Imh0c ib28uYXRsYXNzaWFuLm5IdClsIm5vZGVUeXBIjoiSkISQV9DTE9VRCIsImIzc3VIVHJNY2ticlZlcnNpb24iOil3LjAuMCIsIr WZXJzaW9uljoiNy4wLjAiLCJub2RIVmVyc2lvbil6IjUuMy4zIiwiZXhhbGF0ZVBsdWdpblZlcnNpb24iOil1LjMuMyIsIm1pb dHNWZXJzaW9uljoiMS4yLjAiLCItYXhIdWJPYmpIY3RzVmVyc2lvbil6IjEuMTQuMCIsIm1pbJIc3RWZXJzaW9uljoiMS4w	
Fib28uYXRsyXNzaWFuLm5ldClsIm5vZGVUeXBIIjoiSkISQV9DTE9VRClsImizc3VIVHJhY2tlclZlcnNpb24iOii3LjAuMClsIr WZXJzaW9uIjoiNy4wLjAiLCJub2RIVmVyc2lvbil6ljUuMy4zIiwiZXhhbGF0ZVBsdWdpblZlcnNpb24iOiI1LjMuMyIsIm1pb	
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iOil1LiMuNClsImluc3RhbmNlVWlkljoiODdiZWE2MWltYTk2Mi00YjdiLWl1NzUtZiE5MDRiOGU0ZDA3liwiZWRpdG9vlj	
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/Vx1MDAvNmRic3QtdXJsXHUwMDNkaHR0cHMIM0EIMkYIMkZuYWJvbv5hdGxhc3NpYW4ubmV0JTJGcGx1Z2lucvUv	

14. Click Next.

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

Note: Selecting the project 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	n
14. Click Confir	m.	

The Connection has been set up.

	Exalate	×
	Connection established successfully ✓ Sync your first issue to see how it works.	
	Please enter an issue key from the project Test (TEST) to proceed	
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