

# Set up a Connection in Basic Mode for GitHub

Last Modified on 03/12/2024 10:50 am EDT

Connections in Basic mode have a set of **Sync Rules**, generated by Exalate.

With a Basic connection, you can sync a basic set of issue fields: summary, description, and comments.

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 GitHub

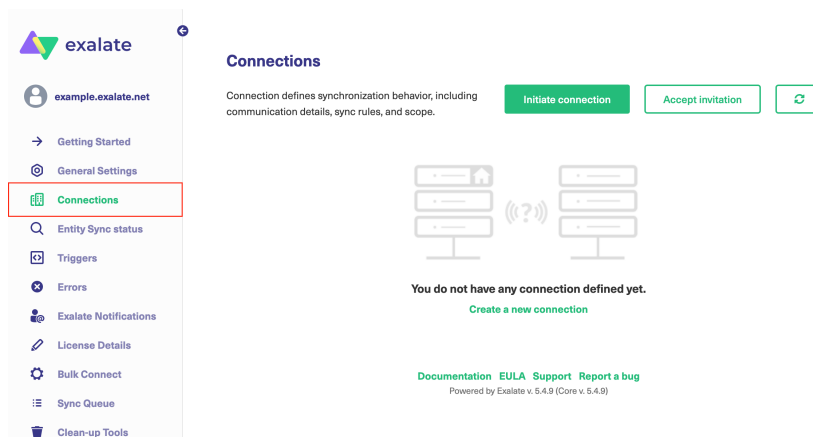
**Note:** It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same.

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

Enter the Exalate app for GitHub URL in your browser to open the Exalate admin console

**Note:** Use this link to access your Exalate admin console:

<https://connect.exalate.net/github/find>



2. Click **Initiate connection**.

#### Connections

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

Initiate connection

Accept invitation



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 ⓘ

https://example.exalate.net

I don't have a URL ☒

Next

Exalate suggests available Configuration Modes based on the destination instance.

4. Select **Basic**.

5. Click **Next**.

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

Initiate connection

Select a repository for the incoming sync

Exalate generates default sync rules to synchronize basic issue fields. By default the following issue data will be synchronized: summary, description, comments, attachments and issue types.

Please select the repository where you want to create issues, received from the other side.\*

Select Repository

< Previous

Next

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 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 connection

Do you have admin access to the destination instance?

✓ Yes, I have admin access

- 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

Initiate

## 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.

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.

**Accept invitation** ×

**Select a repository 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 a issue type is not included in the basic set, it will be synced as a task.

**Please select the repository where you want to create issues, received from the other side.\***

Select Repository ▾

Confirm

10. 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 repository **Exalate-team/testsync** to proceed

Enter an issue id, for example 9

Exalate

## Steps for: No, I don't have Admin Access

Click **No, I don't have admin access & Initiate** the connection.

9. Click **Copy invitation code**.

You can send the invitation code to the destination instance admin.

A screenshot of a web application interface. At the top, there is a purple header bar with the text 'Initiate connection' in white and a small 'x' icon in the top right corner. Below the header is a large white rectangular area with a thin gray border. Inside this area, the text reads: 'On the “company B” side, you (or their application administrator) need to Accept the Invitation.' where 'Accept the Invitation.' is in green. Below this text, it says 'Use the following invitation code:'. Underneath that is a green-outlined button with the text 'Copy invitation code'. At the bottom of the white area is a faint, light gray watermark that says 'SAP'. Below the white area is a thin gray horizontal line. At the very bottom right, there is a gray button with the text 'Done'.

10. Click **Done**.

**Note:** Complete the following steps on the destination instance.

11. Paste the invitation code.

Accept Invitation

Please paste the invitation code, received from your partner

Enter the invitation code

eyJpbmVjdHhhdWVudG90aW9uU2VjcmV0IjoiaWU5SnpGckZHZGhqZiNnVGQib1NKN3pablp0clV3MWUuIjCjpbmVpdGkVksW5dGFuY2V2VWVWQioiImMDYwYmE2YyXNTG5LTQxNDUuYTk2MS03MGizNWUyMjgzZjQlClJub2RlSW5mbly6eyluYw1lIjoibmFib28lClJiYXNlVXJsIjoiHlR0cHhM6L9qY2xvdWRub2RlWxwZ2Y2b3Zzei14c250LXFicmEuXzhhbGFG0ZS5jbG91ZCIsImIz3VlVHhY2tclVybCl6Imh0dHBoi8vbmFib28uYXRyXnZaWfuLm5ldClsm5vZGVUeXBlljoiSkISQV9DTE9VRClsmIz3VlVHhY2tclZlcnNpb24iOiI3LjAuCMIsIm5vZGVb24iOiI1LjMuMyIsIm1pbkhi1Yk9iaWVjdHhhdWVudG90aW9uIjMS4yLjAiClI2YtXhdWYyPmYpY3R2VmVyc2Vlbi6lJlEuMTQmQUcmlsm1pblJlc3RwZjZaW9uIjMS4wLjAiClJyXhSZXN0VmVyc2Vlbi6lJlUuMi44liwicG9sbE9ubHkiOmZhbHNlClJleGFDb21wVmVyc2Vlbi6lJlUuMy40liwicmF3RXhhQ2929tcFzIcnNpb24iOiI1LjMuNCIsImIz3RhbmlNIVWkljoiDDiZWE2MWItYTk2Mio0YjdiLW1lNzUzZjE5MDRiOGU0ZDA3liwiZWpG9yIjY7lmFkbWluUHJvb2Z2cmxUZW1wbGFG0ZSI6Imh0dHBoi8vbmFib28uYXRyXnZaWfuLm5ldC9sb2dpbj9yZWYpZmVjdE9ndVW50XHUwMDNkMVx1MDAyNmRlc3Q2XjShXUwMDNkHROcHMIM0EIMKYIMKZuYVJvby5hdGxhc3NpYW4ubmV0JTJGcGx1Z2lucyJyLnRlcn...

Next

12. Click **Next**.

13. Select the project or repository 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 invitationx

**Select a repository 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.

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Please select the repository where you want to create issues, received from the other side.\*

Select Repository | v

Confirm

14. Click **Confirm**.

Exalatex

**Connection established successfully** ✓

Sync your first issue to see how it works.

Please enter an issue key from the repository **Exalate-team/testsync** to proceed

Enter an issue id, for example 9

Exalate

The Connection has been set up.

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