

Exalate Operation

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Exalate Operation

Note: This operation is used for the manual synchronization of entities.

An entity is an information unit in every task management system that can be synced with the help of Exalate. For example, here are the most common entities for each task management system that can be synced with the help of Exalate:

- Jira Cloud: issues, epics.
- Jira on-premise/ Datacenter: issues, epics.
- Azure DevOps: work items, epics.
- GitHub: issues, pull requests.
- Monday.com: tasks
- Salesforce: objects, like cases, opportunities, tasks, accounts, etc.
- ServiceNow: incidents, stories, epics, etc.
- Zendesk: tickets
- Freshdesk: tickets

To Exalate an entity means to put the entity under sync or synchronize it to the destination instance.

Note: For more information, read [How to connect entities from the sync panel](#).

Below you can find detailed information on how to use the Exalate Operation in every task management system.

Jira Cloud Manual Sync

Manual synchronization in Jira Cloud happens via the **Exalate** button in the Sync Status Panel present under the issue view.

Note: The Sync Status Panel is available under the specific entity (i.e, issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce.

For other platforms like GitHub, ServiceNow, Freshdesk, including Jira, Zendesk, Azure DevOps, and Salesforce, this button is available under the Exalate admin console in the **Entity Sync Status** tab.

Exalate the Issue from Jira

1. **Create** an issue in Jira.

Open the issue.

There is an Exalate Sync Panel under every issue view. Open it.

2. **Exalate** the Issue

You can see 2 buttons on the Exalate panel: Exalate & Connect.

Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

- 2.1. To Exalate an issue, click the **Exalate** button.
- 2.2. Choose the name of the Connection you have created.
- 2.3. Click **Submit**.

You are able to see the progress of the synchronization within the Exalate Sync Status panel. This status is also visible in the Entity Sync status tab on the Exalate admin panel.

Jira On-premise Manual Sync

Manual synchronization in Jira On-premise happens via the **Exalate** button in the Sync Status Panel present under the issue view.

Note: If the Exalate button is not available on the issue view you need to enable it in the [General Settings](#).

Note: The Sync Status Panel is available under the specific entity (i.e, issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce.

For other platforms like GitHub, ServiceNow, Freshdesk, including Jira, Zendesk, Azure DevOps, and Salesforce, this button is available under the Exalate admin console in the **Entity Sync Status** tab.

Exalate the Issue from Jira

1. **Create** an issue in Jira.

Open the issue.

2. The Exalate issue operation is located under **More** tab on the issue view

3. **Exalate** the Issue

You can see 2 buttons on the Exalate panel: Exalate & Connect.

Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

- 3.1. To Exalate an issue, click the **Exalate** button.
- 3.2. Choose the name of the Connection you have created.
- 3.3. Click **Submit**.

You are able to see the progress of the synchronization within the Exalate panel. This status is also visible in the Entity Sync status tab on the Exalate admin panel.

Azure DevOps Manual Sync

Manual synchronization in Azure DevOps happens via the **Exalate** button in the Sync Status Panel present under the work item view.

Note: The Sync Status Panel is available under the specific entity (i.e, issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce.

For other platforms like GitHub, ServiceNow, Freshdesk, including Jira, Zendesk, Azure DevOps, and Salesforce, this button is available under the Exalate admin console in the Entity Sync Status tab.

Exalate the Work Item from Azure DevOps

1. **Create** a work item in Azure DevOps

2. **Exalate** the Issue

You can see 2 buttons on the Exalate panel: Exalate & Connect.

Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

- 2.1. To Exalate an issue, click the **Exalate** button.
- 2.2. Choose the name of the Connection you have created.
- 2.3. Click **Submit**.

You are able to see the progress of the synchronization within the Exalate panel. This status is also visible in the Entity Sync status tab on the Exalate admin panel.

GitHub Manual Sync

Manual synchronization in GitHub happens via the **Exalate** button in the **Entity Sync Status** Panel present under the Exalate admin console.

Note: The Sync Status Panel is available under the specific entity (i.e, issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce.

For other platforms like GitHub, ServiceNow, Freshdesk, including Jira, Zendesk, Azure DevOps, and Salesforce, this button is available under the Exalate admin console in the **Entity Sync Status** tab.

Exalate the Issues from GitHub

1. Go to the **Entity Sync status** tab in the Exalate admin console.
2. This sync panel provides a view of the status of the entity under sync. You can also find the remote entity link in there if it is available.
Select the repository from a drop-down list.
Enter the Entity URN. Then click on the Search button.
In case the entity is already under synchronization, you see the entity status and the remote issue link in case it's available.

3. **Exalate** the Issue

You can see 2 buttons at the bottom on the Exalate panel: **Exalate** & **Connect**. If the entity is not synchronized the following status is displayed.

Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

- 3.1. To Exalate an issue, click the **Exalate** button.
- 3.2. Choose the name of the Connection you have created.
- 3.3. Click **Submit**.

You are able to see the progress of the synchronization within the panel.

Salesforce Manual Sync

Manual synchronization in Salesforce happens via the **Exalate** button in the Sync Status Panel

present under the Salesforce Object view.

Note: The Sync Status Panel is available under the specific entity (i.e, issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce.

For other platforms like GitHub, ServiceNow, Freshdesk, including Jira, Zendesk, Azure DevOps, and Salesforce, this button is available under the Exalate admin console in the **Entity Sync Status** tab.

Exalate the Entities from Salesforce

1. Open the particular Salesforce entity.

There is an Exalate panel under the entity view.

Learn how to [add the sync panel to Salesforce entity views](#).

2. **Exalate** the Entity

You can see 2 buttons at the bottom of the Exalate panel: **Exalate** & **Connect**. If the entity is not synchronized the following status is displayed.

Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

- 2.1. To Exalate an entity, click the **Exalate** button.
- 2.2. Choose the name of the Connection you have created.
- 2.3. Click **Submit**.

You are able to see the progress of the synchronization within the panel in the form of sync statuses.

ServiceNow Manual Sync

Manual synchronization in ServiceNow happens via the **Exalate** button in the **Entity Sync Status** Panel present under the Exalate admin console.

Note: The Sync Status Panel is available under the specific entity (i.e, issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce.

For other platforms like GitHub, ServiceNow, Freshdesk, including Jira, Zendesk, Azure DevOps, and Salesforce, this button is available under the Exalate admin console in the **Entity Sync Status** tab.

Exalate the entities from ServiceNow

1. Go to the **Entity Sync status** tab in the Exalate admin console.

2. This sync panel provides a view of the status of the entity under sync. You can also find the remote entity link in there if it is available.

Select the entity type in ServiceNow from a drop-down list. The common ones are: Incidents, Problems, Change Requests, Cases, Request Items (RITM), and Catalog Tasks.

Enter the Entity URN. Then click on the **Search** button.

In case the entity is already under synchronization, you see the entity status and the remote issue link in case it's available.

3. **Exalate** the Issue

You can see 2 buttons at the bottom of the Exalate panel: **Exalate** & **Connect**. If the entity is not synchronized the following status is displayed.

Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

- 3.1. To Exalate an entity, click the **Exalate** button.

- 3.2. Choose the name of the Connection you have created.

- 3.3. Click **Submit**.

You are able to see the progress of the synchronization within the panel.

Zendesk Manual Sync

Manual synchronization in Zendesk happens via the **Exalate** button in the Sync Status Panel present under the ticket view.

Note: The Sync Status Panel is available under the specific entity (i.e, issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce. For other platforms like GitHub, ServiceNow, Freshdesk, including Jira, Zendesk, Azure DevOps, and Salesforce, this button is available under the Exalate admin console in the Entity Sync Status tab.

Exalate the Ticket from Zendesk

1. Open the ticket you want to sync.

2. Click **Apps → Exalate**

3. **Exalate** the Issue

You can see 2 buttons on the Exalate panel: Exalate & Connect.

Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

- 3.1. To Exalate an issue, click the **Exalate** button.
- 3.2. Choose the name of the Connection you have created.
- 3.3. Click **Submit**.

You are able to see the progress of the synchronization within the Exalate panel. This status is also visible in the Entity Sync status tab on the Exalate admin panel.

Note: If a Zendesk ticket has been closed, updates made on the remote side are not synchronized.

HP ALM/QC Manual Sync

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/>.

Manual synchronization in HP ALM/QC happens via the **Exalate** button in the **Entity Sync Status** Panel present under the Exalate admin console.

Note: The Sync Status Panel is available under the specific entity (i.e issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce.

For other platforms like GitHub, ServiceNow, HP ALM/QC including Jira, Zendesk, Azure DevOps, and Salesforce this button is available under the Exalate admin console in the Entity Sync Status tab.

Exalate the entities from HP ALM/QC

1. Go to the **Entity Sync status** tab in the Exalate admin console.
2. This sync panel provides a view of the status of the entity under sync. You can also find the remote entity link in there if it is available.
Select the entity type in HP ALM/QC, i.e either defect or test case.
In case the entity is already under synchronization you see the entitystatus and the remote issue link in case it's available.

3. **Exalate** the Issue

You can see 2 buttons at the bottom on the Exalate panel: **Exalate** & **Connect**. If the entity is not synchronized the following status is displayed.

Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

- 3.1. To Exalate an entity, click the **Exalate** button.
- 3.2. Choose the name of the Connection you have created.
- 3.3. Click **Submit**.

You are able to see the progress of the synchronization within the panel.

Freshdesk Manual Sync

Manual synchronization in Freshdesk happens via the **Exalate** button in the **Entity Sync Status** Panel present under the Exalate admin console.

Note: The Sync Status Panel is available under the specific entity (i.e, issue, work item, tickets, Cases, etc) view in Jira, Zendesk, Azure DevOps, and Salesforce.

For other platforms like Freshdesk, GitHub, ServiceNow, including Jira, Zendesk, Azure DevOps, and Salesforce, this button is available under the Exalate admin console in the **Entity Sync Status** tab.

Exalate the Issues from Freshdesk

- 3.1. Go to the **Entity Sync status** tab in the Exalate admin console.

- 3.2. This sync panel provides a view of the status of the entity under sync. You can also find the remote entity link in there if it is available.

Enter the ticket number. Then click on the Search button.

In case the entity is already under synchronization you see the entity status and the remote issue link in case it's available.

- 3.3. **Exalate** the Issue

If the entity is not synchronized, 2 buttons at the bottom of the Exalate panel are displayed: **Exalate** & **Connect**.

Exalate allows you to synchronize & create a new entity on the destination instance.

Connect allows you to connect 2 existing entities present in both instances.

- 3.3.1. To Exalate an issue, click the **Exalate** button.
- 3.3.2. Choose the name of the Connection you have created.
- 3.3.3. Click Exalate.

You are able to see the progress of the synchronization within the panel.

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