

# Setting Up a Basic connection On a Project Level in Exalate for Jira Cloud

Last Modified on 03/18/2024 9:36 am EDT

Starting with version 5.2.0, not only Global administrators but also Project administrators can set up Basic connections right from the Project settings.

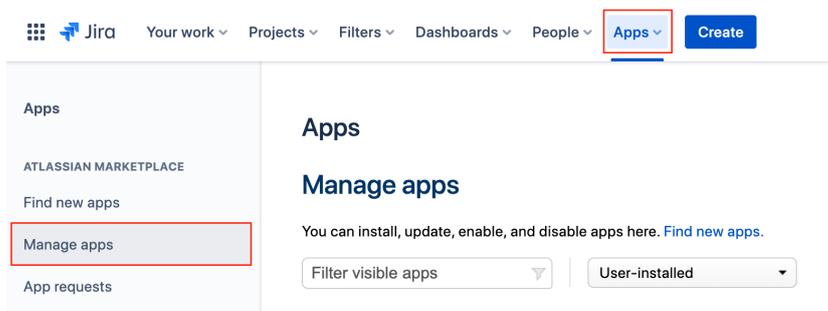
This article shows how to establish a Basic connection specifically on a Project level.

## How to Enable Connection Set Up on a Project Level?

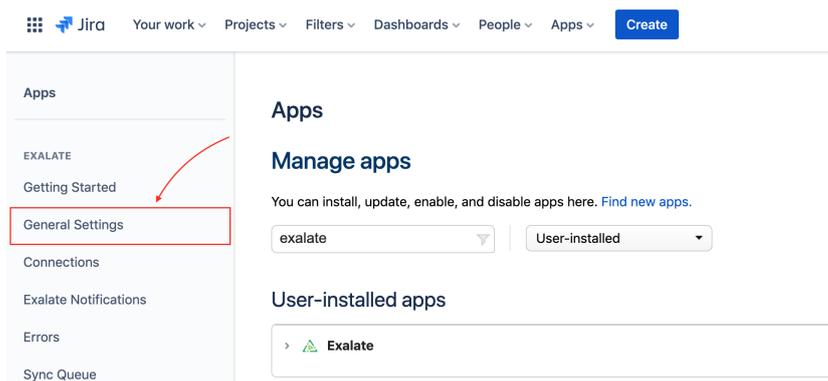
A Global administrator should enable connection set up on a Project level.

To enable Project level connections:

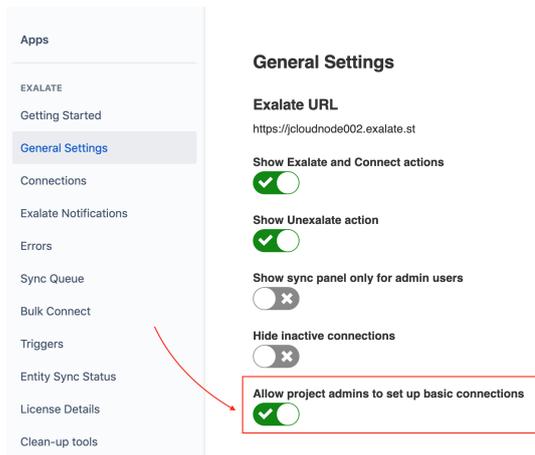
1. Go to **Apps** -> **Manage your apps**.



2. Under the Exalate menu click **General Settings**.



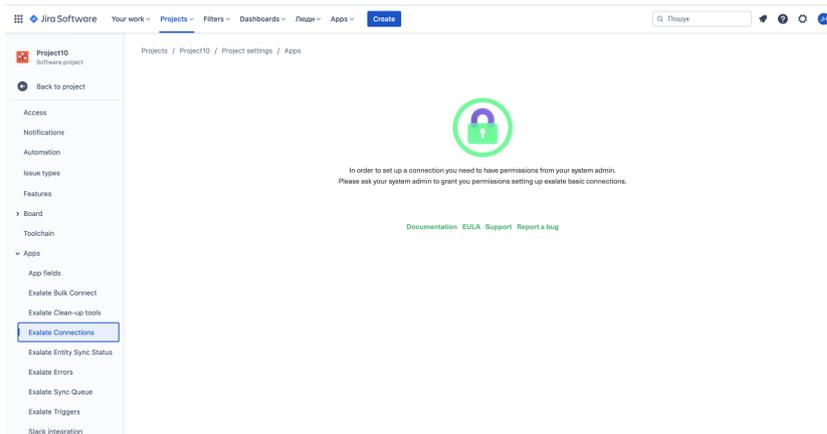
3. Enable the corresponding toggle to allow project admins to set up basic connections.



Once global admin enables this option, project admins assigned to the user group **exalate-project-level-administrators** is able to set up basic connections right from their Project settings.

**Note:** If the toggle is active, the following conditions apply:

- Users that belong to **exalate-project-level-administrators** group can use Exalate on a project level.
- If the user group **exalate-project-level-administrators** doesn't exist, all the Project admins are able to access Exalate from their Project settings.
- If the group exists but is empty, none of the project admins can use Exalate on a project level.
- If the group does not exist at all, all project admins can use Exalate on a project level.

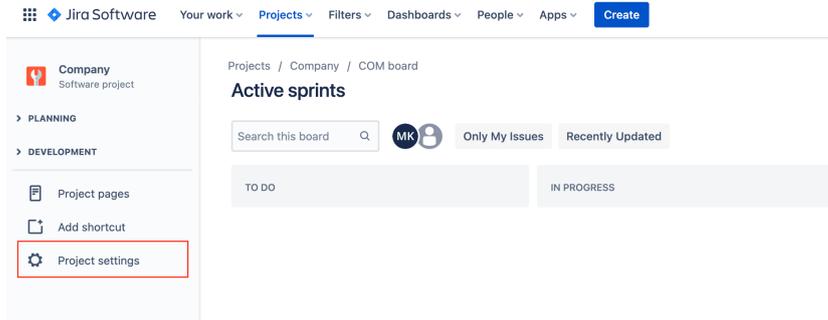


## How to Initiate a Basic Connection from the Project Settings

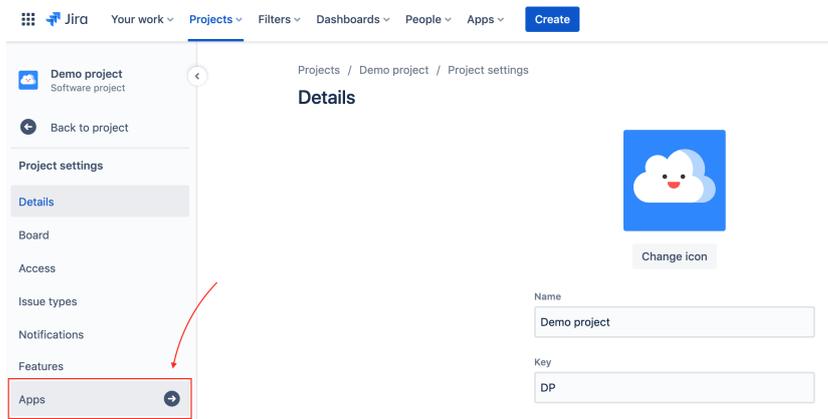
Basic connections have a set of sync rules, generated by Exalate. You can sync a basic set of issue fields: summary, description, comments, attachments, and issue types.

To initiate a Basic connection on a Project level:

1. Navigate to **Projects** and select your project from the list.
2. Click **Project settings** from the project menu sidebar.

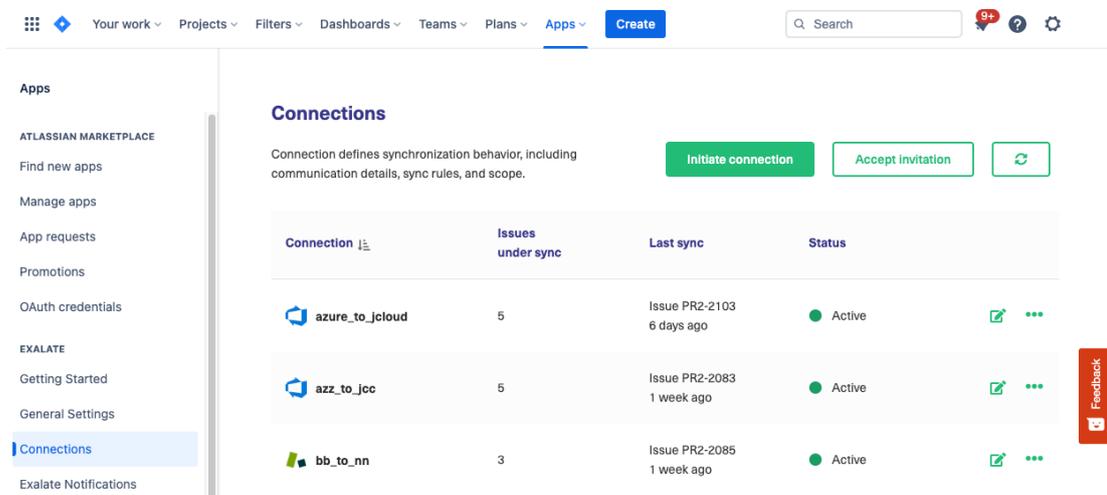


3. Click **Apps**.



**Note:** If you are in a company-managed project, there is no step 3, since the Exalate menu appears right in the **Project settings**.

4. Click **Exalate connections** -> **Initiate connection**.



5. Specify if you have the link to the destination instance.

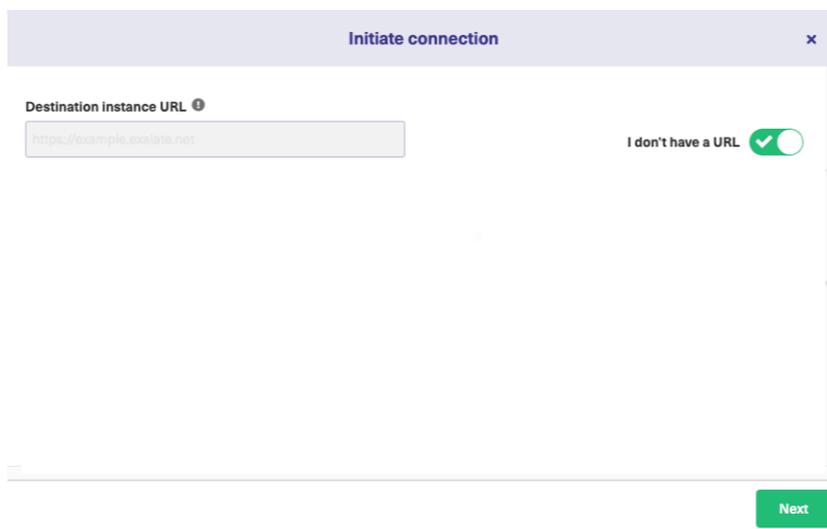
To set up a connection with an instance:

1. Enter the link to the destination instance in the **Destination instance URL** field. You can enter the link to the instance you are trying to connect, or the **Exalate URL** from [General Settings](#). If you enter a link to your instance, Exalate determines it's a [local connection](#) between two projects within your instance.



The screenshot shows a dialog box titled "Initiate connection" with a close button (x) in the top right corner. Below the title bar, there is a label "Destination instance URL" with a help icon (i). A text input field contains the URL "https://example.exalate.com" and has a green checkmark to its right. To the right of the input field is a toggle switch labeled "I don't have a URL" which is currently turned off.

2. Click **I don't have a URL** if the destination instance is in a private network, or you don't have the link.



The screenshot shows the same "Initiate connection" dialog box. The "Destination instance URL" field is now disabled (grayed out) and contains "https://example.exalate.net". The "I don't have a URL" toggle is now turned on and has a green checkmark to its right. At the bottom right of the dialog box, there is a green button labeled "Next".

3. Exalate suggests available configuration types based on the destination instance's version of Exalate.

Select the appropriate tab below:

## The Destination Instance URL is Known

4. Click **Initiate**

**Important:** Basic connections cannot be initiated if the destination instance has an older Exalate version.

Initiate connection
✕

**Destination instance URL** ⓘ

✓

I don't have a URL ✕

**Choose the configuration type**

**Basic**

- 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

Initiate

5. Specify if you have admin access to the destination instance

## If You have Admin Access to the Destination Instance

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

6. Click **Initiate**.

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

You are automatically redirected to the destination instance to log in. If the redirection was not successful, click **Go to remote**.

**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

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[← Previous](#) Go to remote

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

7. Select a project for the incoming sync.

You can select one of the projects you have admin access.

**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.\***

▾

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[← Previous](#) Confirm

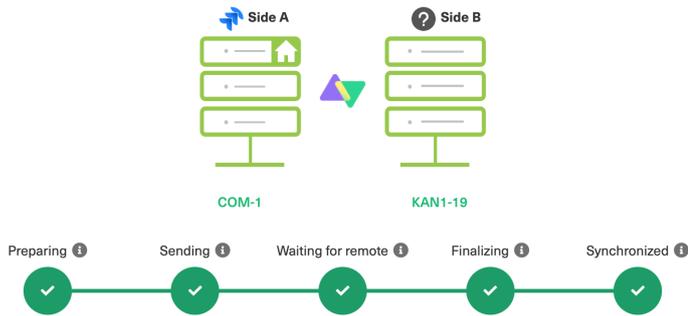
8. Click **Confirm**.

After establishing the connection, you can sync your first issue in Exalate to see how it works: enter an issue key and click **Exalate**. Or you can click ✕ to close the window and sync an issue on your own:

- By [Connecting an issue](#).
- By [Syncing issues in bulk](#).
- By creating a [trigger](#).

When syncing your first issue, you see the status of your sync.

**Congratulations!**



## If You Don't have Admin Access to the Destination Instance

### 6. Click **Initiate**

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**

### 7. 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

8. Click **Done**.

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

9. Click **Accept Invitation**.

**Connections**

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

Initiate connection
Accept invitation
↻

10. Paste the invitation code.

**Accept Invitation** ✕

**Please paste the invitation code, received from your partner**

Enter the invitation code

eyJpbmZpdGF0aW9uU2VjcmV0Ijo1NUI2SnpgckZHGHqZINrVGIQb1NKN3pablp0eIV3MWUilCJpbNZpdGVkSW5zdGFuY2V2VWQIO  
 iJmMDYwYmE2YyOxNTg5LTQxNDUyYTk2MS03MGizNWUyMjgzZjQiLCJub2RlSW5mbyl6eyJuYW11IjoibmFib28lClJiYXNlVXsJljoiaH  
 R0cHM6Ly9qY2xvdWRub2RlWxxZ2Ytb3Zzei14c250LXFicmEuZXhhbGF0ZS5jbG91ZClslmZc3VlVHJhY2tcllVybCl6Imh0dHBzOi8v  
 bmFib28uYXR5YXNzaWFluLm5ldClslm5vZGVUeXBlljoiSkSQV9DTE9VRCIsImZc3VlVHJhY2tcllZlcnNpb24iOiI3LjAuMCIslm5vZGVb  
 cHBWZXJzaW9uIjo1NjA4LjAiLCJub2RlVmVyc2lvcil6ijUuMy4zliwiZXhhbGF0ZVBsdWdpbZlcnNpb24iOiI1LjMuMyIsIm1pbkh1Yk9ia  
 mVjdHNWZXJzaW9uIjo1MS4yLjAiLCJiYXNlclVwYm91Y3RzVmVyc2lvcil6ijEuMTQuMCIslm1pbllc3RlWZJzaW9uIjo1MS4wLjAiLCJiY  
 XhSZXN0VmVyc2lvcil6ijUuMi4wliwicG9sbE9ubHkiOmZhbHNILClleGFDb21wVmVyc2lvcil6ijUuMy40liwicmF3RXhhQ29tcFZlcnNp  
 b24iOiI1LjMuNCIsImZc3RhbmlNlVWkljoiODdiZWE2MmVlYTk2Mi00YjdiLW11NzUzZjE5MDRiOUZDA3liwiZWRpdG9yIjo7ImFkb  
 WluUHJvb2Z2VcmxUZW1wbGF0ZS5l6Imh0dHBzOi8vbmFib28uYXR5YXNzaWFluLm5ldClslm5vZGVUeXBlljoiSkSQV9DTE9VRCIsImZc3VlVHJhY2tcllZlcnNpb24iOiI1MDA5NmRlc3QtdXsXHUwMDNkaHR0cHMIM0EIMkYIMkZuYWVyb25hdGxhc3NpYW4ubmV0JTJGeGx1Z2lucyUyRnNlcn...

Next

11. Click **Next**.

11. Select a project for the incoming sync.

**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.\***

▼

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[← Previous](#)[Confirm](#)

12. Click **Confirm**.

After establishing the connection, you can sync your first issue in Exalate to see how it works: enter an issue key and click **Exalate**. Or you can click  to close the window and sync an issue on your own:

- By [Connecting an issue](#).
- By [Syncing issues in bulk](#).
- By creating a [trigger](#).

**Exalate** ✕

**Connection established successfully** ✓

Sync your first issue to see how it works.

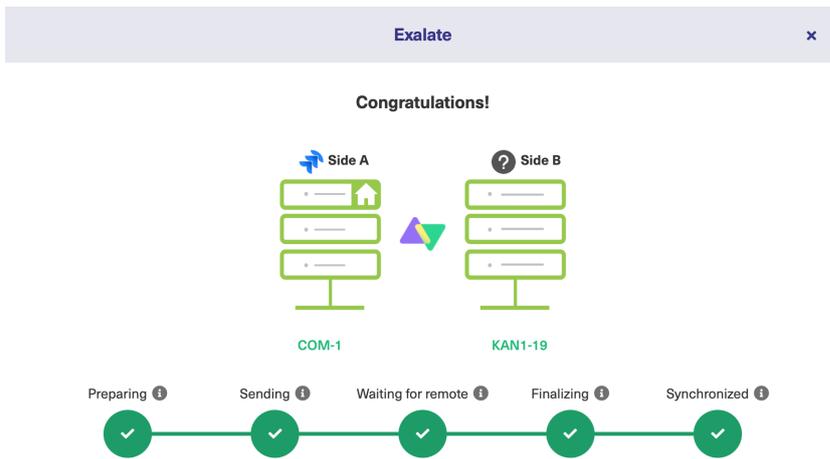
Please enter an issue key from the project **Test (TEST)** to proceed

TEST-1

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[Exalate](#)

When syncing your first issue, you see the status of your sync.



## The Destination Instance URL is Not Known

### 4. Click **Initiate**

You can still set up a connection and send an invitation to connect to the destination instance administrator.

The screenshot shows a dialog box titled "Initiate connection" with a close button. It contains a text input field for "Destination instance URL" with the value "https://example.exalate.com" and a green checkmark. To the right of the input field is a toggle switch labeled "I don't have a URL" which is currently turned off. Below this is a section titled "Choose the configuration type" with three options: "Basic", "Visual", and "Script". The "Basic" option is highlighted with a green border and contains a list of features: "Automatic configuration of basic fields", "Sync rules cannot be edited", "Only issues can be synced", and "Recommended for use cases of basic complexity". The "Visual" option is marked as "BETA" and contains: "Low-code, visual interface", "Configure both sides of the connection using a single interface", and "Recommended for use cases of basic to intermediate complexity". The "Script" option contains: "Groovy-based scripting", "Configure each side of the connection separately", and "Recommended for use cases of basic to advanced complexity". At the bottom right of the dialog is a green "Initiate" button.

### 5. Click **Copy Invitation code**.



**Accept invitation** x

**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.\***

v

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[< Previous](#) Confirm

11. Click **Confirm**.

After establishing the connection, you can sync your first issue in Exalate to see how it works: enter an issue key and click **Exalate**. Or you can click  to close the window and sync an issue on your own:

- By [Connecting an issue](#).
- By [Syncing issues in bulk](#).
- By creating a [trigger](#).

**Exalate** x

**Connection established successfully** ✓

Sync your first issue to see how it works.

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

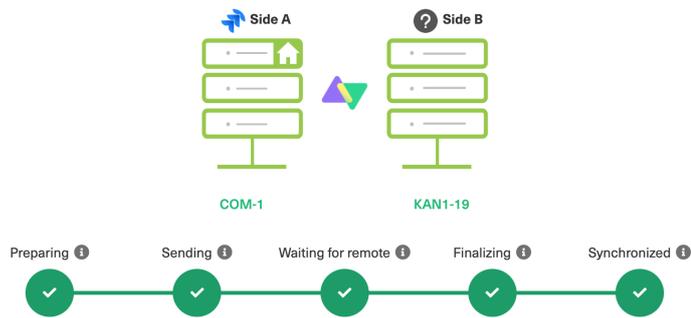
TEST-1

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[Exalate](#)

When syncing your first issue, you can see the status of your sync:

## Congratulations!



Have more questions? [Ask the community](#)

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

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