

Set up a Connection in Basic Mode for Jira Cloud

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Note: Before you set up a Connection in Basic mode ensure that you don't use an older version of Exalate.

Connections in Basic mode have a set of **Sync Rules**, generated by Exalate. This allows you to sync a basic set of issue fields: summary, description, comments, attachments, and issue types.

Note that issue types are mirrored: tasks are synced as tasks, improvements as improvements, and so on. For example, when you sync epic, Exalate creates either an issue with the default issue type, if the default issue type is set in the project configuration, or **Task**, if not set. This also applies to any other issue type that is not found on the destination side.

All comments are synced as public comments.

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

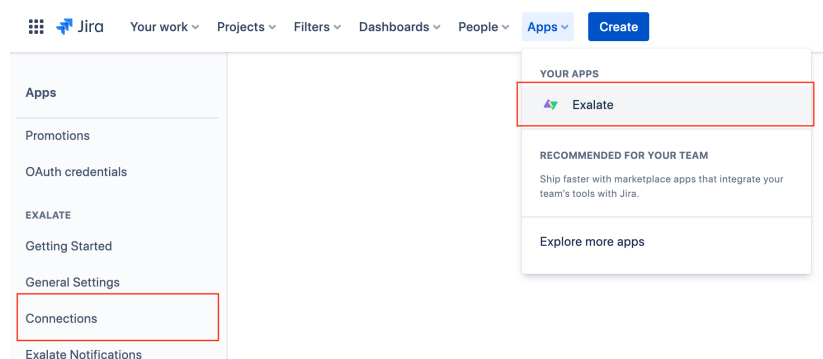
If you want to edit/delete Sync Rules, you must upgrade the connection to Visual Mode or Script Mode.

Set up a Connection in Basic Mode from Jira Cloud

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.

Click **Apps** → **Exalate** & click **Connections** under the Exalate menu.



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 this is 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**.

Initiate connection

Destination instance URL ⓘ

https://example.exalate.com

I don't have a URL

Choose the configuration type

<p> Basic</p> <ul style="list-style-type: none">Automatic configuration of basic fieldsSync rules cannot be editedOnly Issues can be syncedRecommended for use cases of basic complexity	<p> Visual</p> <ul style="list-style-type: none">Low-code, visual interfaceConfigure both sides of the connection using a single interfaceRecommended for use cases of basic to intermediate complexity	<p> Script</p> <ul style="list-style-type: none">Groovy-based scriptingConfigure each side of the connection separatelyRecommended for use cases of basic to advanced complexity
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Initiate

5. Click **Next**.

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

Initiate connection ✕

Select a project 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 project where you want to create issues, received from the other side.*

Select Project

[< Previous](#) [Next](#)

7. Click **Next**.

8. Check if have admin access to the destination instance. Further steps are different whether or not you 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

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Steps for: Yes, I have Admin Access

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

Note: You will be required to verify access on the destination instance. After that, complete the following steps on the destination instance.

9. 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 are established after the previous step.

Accept invitation x

Select a project for the incoming sync

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

Please select the project where you want to create entities, received from the other side.*

v

[< Previous](#) Confirm

10. Click **Confirm**.

The Connection has been set up.

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

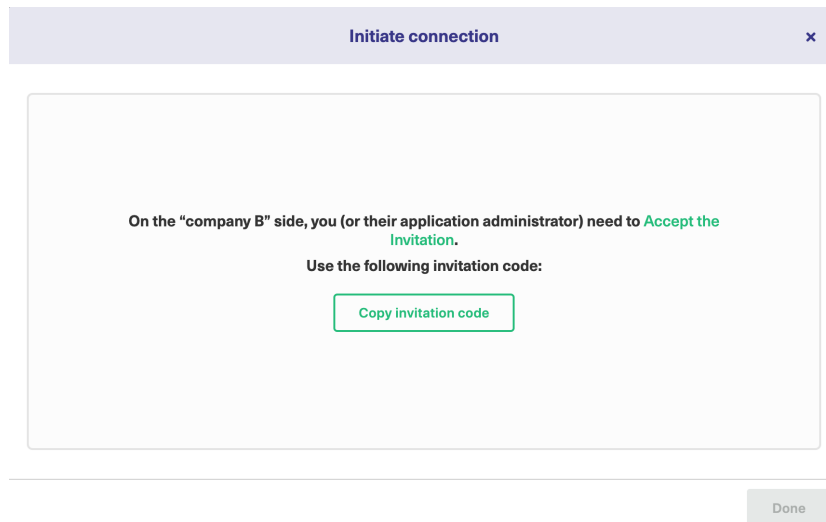
Exalate

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

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

9. Click **Copy invitation code**.

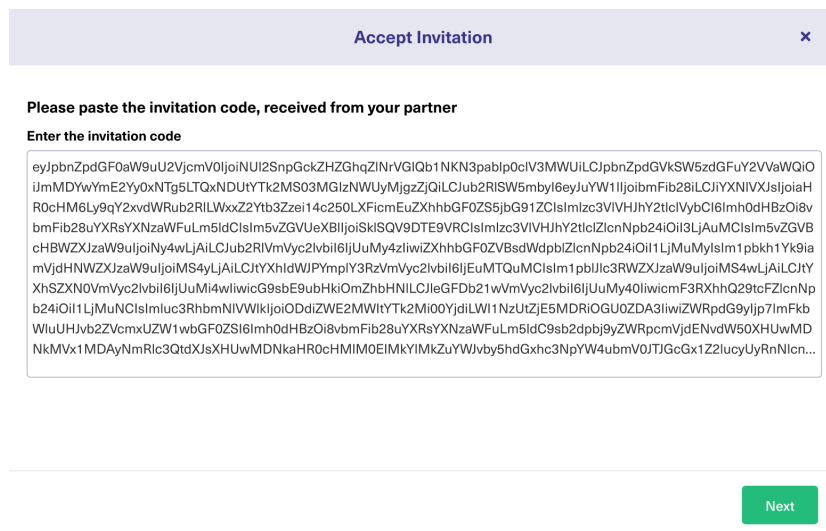
You can send the invitation code to the destination instance admin.



10. Click **Done**.

(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.



12. 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 are established after the previous step.

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

[< Previous](#) Confirm

14. Click **Confirm**.

The Connection has been set up.

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

Exalate

Start Synchronizing

You can sync your first entity in Exalate to see how it works: enter the entity URN on the previous screen and click **Exalate**.

Connection established successfully ✓

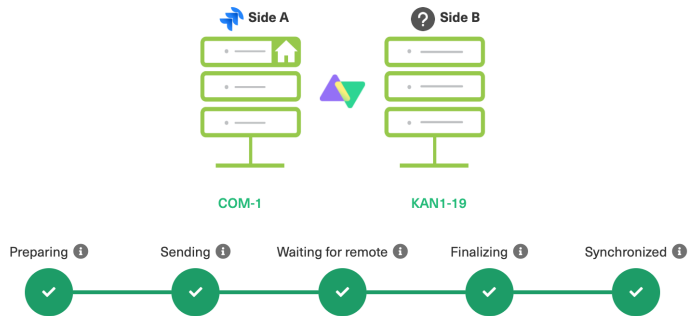
Sync your first issue to see how it works.

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

Exalate

When syncing your first entity, you are the status of your sync. The links to both entities are displayed at the bottom as shown below. You can open them up to see more details.

Congratulations!



What's Next?

Next, you can choose to

- sit back and relax while the sync works!
- [Manually](#) synchronize entities.
- [Connect an](#) entity.
- [Sync entities in bulk](#).
- Create a [trigger](#).

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