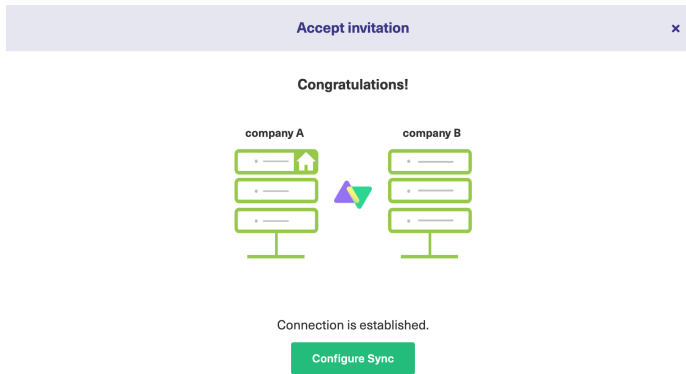



Configure the Connection in Visual Mode for Jira Cloud

Last Modified on 03/18/2024 10:28 am EDT

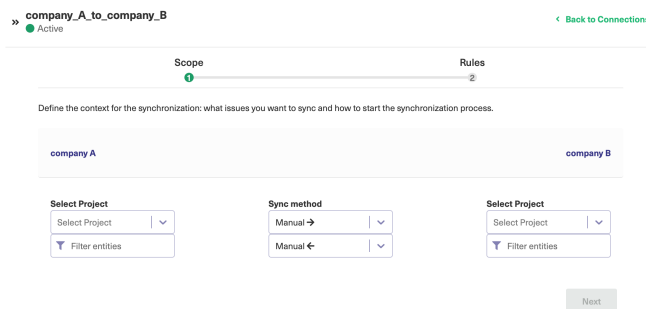
Configure the Sync Scope

1. Click **Configure Sync** on the screen below to start configuring the connection.



You can even configure an existing connection by navigating to the **Connections** tab in the Exalate Admin console. Then click the **Edit Connection**  icon in front of the **Connection** name.

2. **Select Project** on both sides (if applicable).
Select the projects you want to use for the connection, at both ends.



3. Click **Filter entities** (Optional)
With this option, you can decide what information must be synchronized.

Note: If no option is selected, **all** the entities will be synced by default.

Set the Filters

Select the appropriate filter you want from the list. For instance, for Jira, you can choose to sync all **Bugs**, **Tasks** that have a label = 'totest'.

Filters for Jira:

You can also choose to have multiple filter options.

Filters

Select conditions to filter entities for synchronization:

Labels	Issue type	Status
<input type="text" value="Labels"/>	<input type="text" value="Issue type"/>	<input type="text" value="Status"/>

Priority

+ More

Example 1:

Issue type = Bug
 Priority = High, Medium
 Status = Open

In this case, the Priority filter has 2 options. So the options you select are considered as an **OR** operation, **High OR Low**.

With 2 different filter types, **Issue** type and **Priority**, the options you select are considered as an **AND** operation.

So, there are 2 possible combinations for the above sync:

1. Bug with High priority AND Open status,
2. Bug with the Medium priority AND Open status.

Example 2:

If there are no options selected for the Issue type, like in the example below:

Priority = High, Medium
 Status = Open

All issue types with the Priority **High OR Medium** and status **Open** are synced.

4. Set the **Sync Method**

Sync method

Automatic →

Manual ←

This option allows you to decide how information must be synced between the task management systems. You can choose from the following options:

- **Manual:** The issue is synchronized manually.
- **Automatic:** The issue is synchronized automatically based on the entities you have filtered in the previous step.
- **Disabled:** The synchronization is disabled.

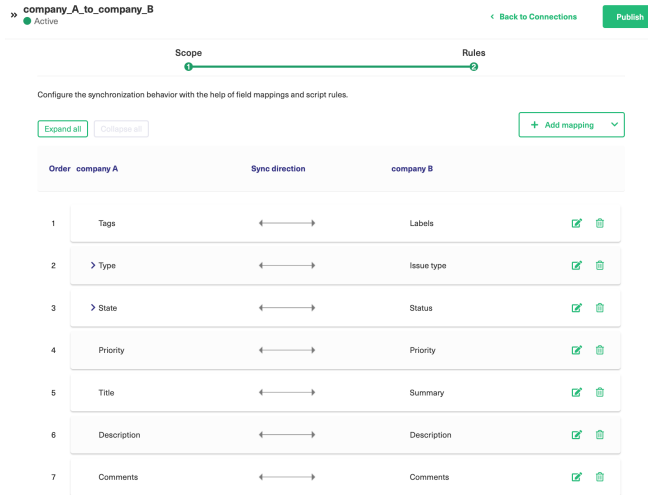
The arrows decide the direction of the synchronization.

5. Click **Next** to configure the field mappings.

Add the Field Mappings (Rules)

Rules denote the mapping between different entities and decide what must be synchronized. There are predefined default mappings for basic fields in every Visual mode Connection.

You can access these mappings by clicking **Next** after configuring the sync. The **Rules** section consists of these mappings.



Note: The above is just an example of mapping. The actual mappings will depend on the platforms under sync.

The top bar displays the local instance's short name & the remote instance's short name. These are the names you provided while setting up a connection.

It also has a **Sync direction**. The arrows indicate the direction, whether uni or bi-directional. You can choose to **Expand all** or **Collapse all** the mappings.

You can **Edit connection**  or **Delete mapping** .

You can also drag and drop them, up or down to re-prioritize.

Edit Mappings

To edit mapping click the **Edit mapping**  icon.



An **Edit mapping** dialog box open.

Edit mapping

company A*

Labels | v

Sync direction

← → | v

company B*

Labels | v ⓘ

If no matching value*

Do nothing | v

If no matching value*

Do nothing | v

Cancel
Save

Select the new fields to be mapped on both sides from the drop-down list. You can also edit the **Sync direction**. Sync direction allows you to control your sync in a specific direction, where the arrows indicate the direction.

Click **Save** to apply the changes.

Delete Mappings

You can delete a specific mapping if you don't need it.

Delete mapping rule? ×

You are about to delete the mapping rule. Synchronization of the field, based on this rule will stop.

Cancel
Delete

Clicking the bin icon opens up a prompt to confirm you want to delete the mapping. Click **Delete** to confirm the deletion.

Add New Mappings

To add a new mapping, click the **Add mapping** button.

» company A_to_company B
● Active
← Back to Connections
Publish

Scope
Rules

Configure the synchronization behavior with the help of field mappings and script rules.

Expand all
Collapse all

+ Add mapping | v

An **Add mapping** dialog box open.

Add mapping

company A*

Sync direction

company B*

Select the required fields at both ends from a drop-down list. You can choose to keep the **Sync direction** as it is by default, or edit it. Sync direction allows you to control your sync in a specific direction, where the arrows indicate the direction.

You can add sub-mappings by clicking the plus icon.

You can also specify what to do if the selected values do not match.

If no matching value *

Set a default value

Report an error

Do nothing

If no matching value *

If no matching value is found you have the following options:

Set a default value	Fields are set to a default value you specify
Report an error	An error appears & be displayed on the Errors tab. The synchronization is blocked in this case
Do nothing	The values stay the same

Save the changes when done.

Custom field mappings

When you set up a Visual mode connection, Exalate fetches some of the custom fields for you. These are available through a drop-down list while adding a mapping.

If you don't find the custom field, there is always an option to add [Scripts](#).

The following are the supported custom field types:

Text:

- **Jira Cloud:** Text Field (multi-line), Text Field (single line)
- **ADO:** Text (single line), Text (multiple lines)
- **Zendesk:** Text, Multi-line, Date, Number, Decimal

Option:

- **Jira Cloud:** Radio Buttons, Select List (single choice)
- **ADO:** Picklist (string), Picklist (integer)

- **Zendesk:** Drop-down

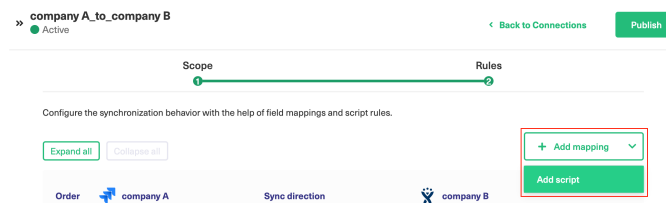
User:

- **Jira Cloud, on-prem:** User Picker (single user)
- **ADO:** Identity
- **Zendesk:** - *Not supported*

Add Scripts for Advanced Configuration (Optional)

For advanced synchronization use cases, you can add Groovy Scripts to your Visual mode Connection.

To do so, click the arrow on the **Add Mapping** button and select **Add Script**.



There is default Script in the dialog box. You can edit it or simply delete the entire Script to start writing from scratch. Click **Save** when you finish adding the Scripts.



Script Syntax:

As a general rule of thumb, the Scripts follow the following syntax:

Where,

```
your_instance_shortcode.issue.customFields."your custom field name".value = remote.issue.customFields."remote custom field name".value
```

1. `your_instance_shortcode` is the source instance.

2. `remote_instance_shortcode` is the destination instance.

These are the names you provided while setting up the Connection.

Initiate connection
✕

Connection information

Source side shortname*

Destination side shortname*

Connection name*

Description

< Previous
Initiate

3. This is followed by other issue properties, each separated with a "." operator.

Publish the Changes

Click **Publish** to save the changes made to the **Scope** and **Rules** section and apply them to the Connection you have created.

» company A_to_company B
< Back to Connections
Publish

Scope ← → Rules

Configure the synchronization behavior with the help of field mappings and script rules.

Expand all
Collapse all
+ Add mapping

Order
company A
Sync direction
company B

You can also use these hotkeys to publish a connection:

- Ctrl+S on Windows or Linux
- Cmd+S on Mac

Note: Configuration changes made to the Connection are applied on the next synchronization.

What's Next?

Options you can consider next:

- If you have chosen to automatically start the synchronization in the Sync Scope, sit back and relax! Entities are synchronized based on the Scope Rules you have set.
- If you want to set up an advanced automatic synchronization you can do so with **Triggers**.
- You can also read the [Visual mode configuration guides](#).

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