Set up a Connection in Basic Mode for AzureDevOps

> **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. With a Basic connection, you can sync a basic set of work item data: summary, description, comments, attachments, and work item types.

All comments are synced as public comments.

> **Important:** 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.

Set Up a Connection in Basic Mode from Azure DevOps

> **Note:** It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same.
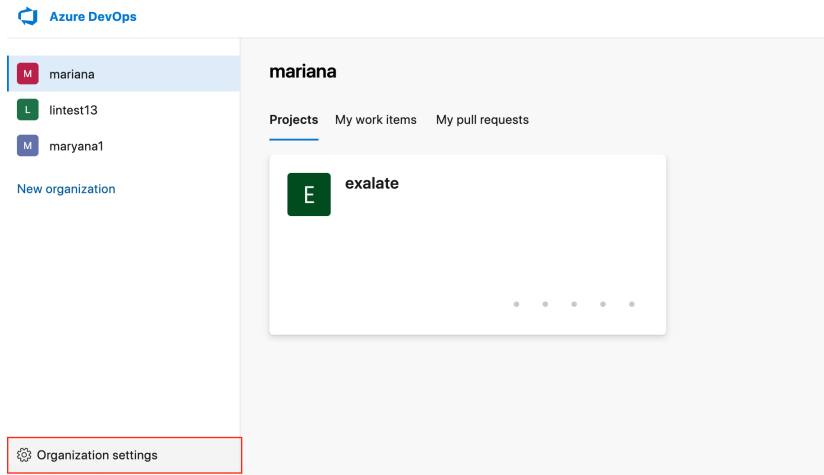
1. Navigate to the **Connections** tab in the Exalate console.

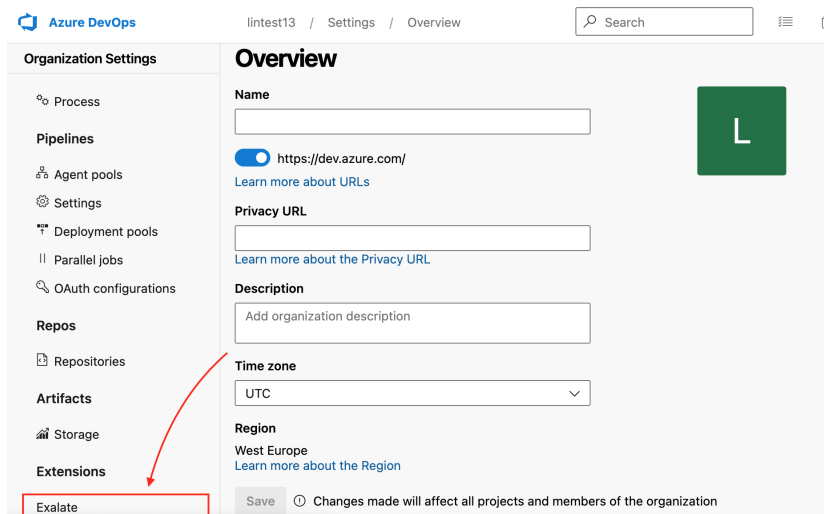> **Note:** You can also access Exalate with this link:
>
> ```
> https://dev.azure.com/{your_organization_name}/_settings/idalko-tools.exalate.adnode
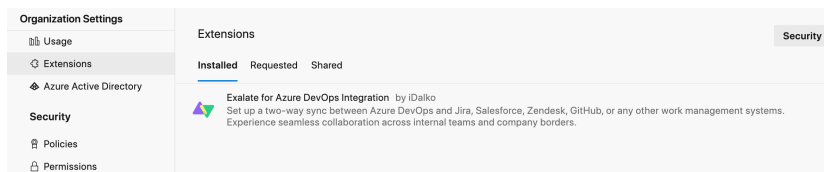> ```

To navigate to the **Connections** tab:
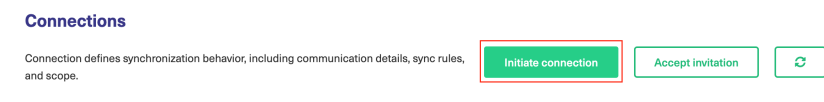
Click **Organization settings.**

Click Exalate in the Extensions section.

Click Connections.

2. Click **Initiate connection**.

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**.**

Exalate suggests available Configuration Modes based on the destination instance.

4. Select **Basic**.

5. Click **Next**.

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

7. Click **Initiate**.

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.

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 or repository is not applicable to all platforms. In this case, the Connection are established after the previous step.

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 project **Test (TEST)** to proceed

TEST-1

Exalate

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.

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

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.

Please paste the invitation code, received from your partner

Enter the invitation code

eyJpbnZpdGF0aW9uU2VjcmV0IjoiNUI2SnpGckZHZGhqZlNrVGlQb1NKN3pablp0clV3MWUiLCJpbnZpdGVkSW5zdGFuY2VVaWQiOiJmMDYwYmE2Yy0xNTg5LTQxNDUtYTk2MS03MGIzNWUyMjgzZjQiLCJub2RlSW5mbyI6eyJuYW1lIjoibmFib28iLCJiYXNlVXJsIjoiaHR0cHM6Ly9qY2vxdWRub2RlLWxxZ2Ytb3Zzei14c250LXFicmcuEuZXhhbGF0ZS5jbG91ZCIsImlzc3VlVHJhY2tlclVybCI6Imh0dHBzOi8vbmFib28uYXRsYXNzaWFuLm5ldClsIm5vZGVUeXBlIjoiSklSQV9DTE9VRCIsImlzc3VlVHJhY2tlclZlcnNpb24iOiI3LjAuMCIsIm5vZGVBcHBWZXJzaW9uIjoiNy4wLjAiLCJub2RlVmVyc2lvbiI6IjUuMy4wIiwiZXhhbGF0ZVZBsdWdpblZlcnNpb24iOiI1LjMuMyIsIm1pbkh1Yk9iamVkHNWZXJzaW9uIjoiMS4yLjAiLCJtYXhIdWJPYmplY3RzVmVyc2lvbil6IjEuMTQuMClsIm1pbEJlc3RWZXJzaW9uIjoiMS4wLjAiLCJtYXhSZXN0VmVyc2lvbil6IjUuMi4wliwicicG9bE9ubHkiOmZhbHNlLCJleGFDb21wWmVyc2lvbil6IjUuMy40liwicmF3RXhhQ29tcFZlcnNpNpb24iOiI1LjMuNClsImluc3RhbmNlVWlkljoiODdiZWE2MWItYTk2Mi00YjdiLWI1NzUtZjE5MDRiOGU0ZDA3liwiZWRpdG9yljp7ImFkbWluUHJvb2ZVcmxUZW1wbGF0ZSI6Imh0dHBzOi8vbmFib28uYXRsYXNzaWFuLm5ldC9sb2dpbj9yZWRpcmVjdENvdW50HUwMD NkMVx1MDAyNmRlc3QtdXJsXHUwMDNkaHR0cHM0cHMlM0ElMkYlMkZuYWJvby5hdGxhc3NpYW4ubmV0JTJGcGx1Z2lucyUyRnNlcn...

Next

12. Click **Next**.

13. Select the project 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.

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.*

Select Project   ⌄

‹ Previous   Confirm

14. 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 project **Test (TEST)** to proceed

| TEST-1 |

                                                    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**.

Exalate   ✕

Connection established successfully ✓
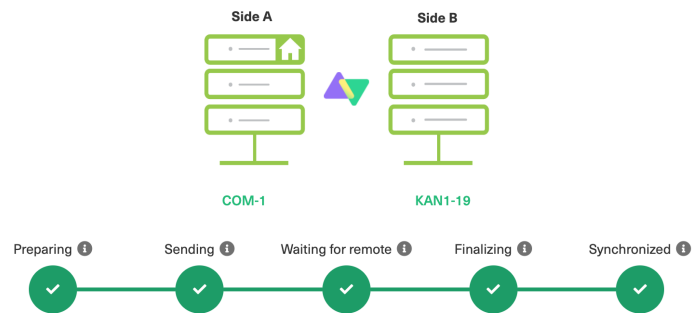
Sync your first issue to see how it works.

Please enter an issue key from the project **Company (COM)** to proceed

| TEST-1 |

                                                    Exalate

When syncing your first entity, you see 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.

Exalate	✕

Congratulations!

Side A   Side B

COM-1   KAN1-19

Preparing ⓘ   Sending ⓘ   Waiting for remote ⓘ   Finalizing ⓘ   Synchronized ⓘ

✓ ─── ✓ ─── ✓ ─── ✓ ─── ✓

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.