Configure the Connection in Visual Mode for Azure DevOps

Last Modified on 03/18/2024 10:45 am EDT

Configure the Sync Scope

1. Click **Configure Sync** to start configuring the connection.

You can also 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.
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 will be synchronized.

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

Set the **Filters**

Filter example:

```
Type = Task, Issue
State = To do, Doing
Priority = 1
```

In this case, the following combinations will be synced:

1. Task with the To do status and priority 1

2. Task with the Doing status and priority 1

3. Issue with the To do status and priority 1

4. Issue with the Doing status and priority 1

4. Set the **Sync Method**

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

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

The arrows indicate 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 & 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

For instance, if you want to edit the Tags ↔ Labels mapping, click the **Edit mapping**   icon**.**

An **Edit mapping** dialog box will open.

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.

Clicking the trash 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.

An **Add mapping** dialog box will open.

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 is found you can choose to:

Option	If the value doesn't exist
Set a default value	Fields will be set to a default value you specify

Option	If the value doesn't exist
Report an error	An error will appear & be displayed on the **Errors** tab. The synchronization will be blocked in this case.
Do nothing	The values stay the same

Save the changes whenever you are ready.

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. Select **Add Script**.

There is a 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:

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

Where,

1. your_instance_shortname is the source instance.

2. remote_instance_shortname is the destination instance.

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

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

Publish the Changes

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

> **Note**: 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 will be 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 will be synchronized based on the Scope Rules you have set.
- But if you want to set up an advanced automatic synchronization you can do so with **Triggers**.
- You can also check out the Visual mode configuration guides.

Product
About Us [↗]
Release History [↗]
Glossary [↗]

ON THIS PAGE
API Reference [↗]
Security [↗]
Pricing and Licensing [↗]

Resources
Academy [↗]
Blog [↗]
YouTube Channel [↗]
Ebooks [↗]

Still need help?
Join our Community [↗]
Visit our Service Desk [↗]
Find a Partner [↗]