Set up a Connection in Basic Mode for ServiceNow

Last Modified on 03/11/2024 8:59 am EDT

> **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. In Basic connections, you can only sync incidents. All comments are synced as public comments.
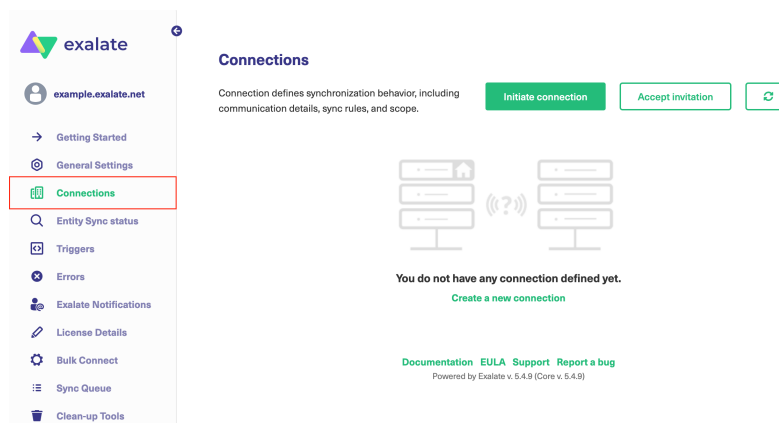
> **Note**: You cannot modify **Sync Rules** in Basic Mode.

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

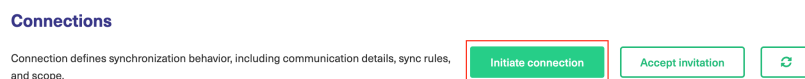## Initiate a Connection in Basic Mode from ServiceNow

> **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 **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**.**

> **Note**: If you enter a link to your instance—Exalate determines it's a local connection between 2 projects within your instance.

Exalate suggests available Configuration Modes based on the destination instance.

4. Select **Basic**.

5. Click **Next**.

6. 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.

7. 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 is established after the previous step.

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.*

Select Project ⌄

‹ Previous   Confirm

9. 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

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**.

> **Note**: 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.

eyJpbnZpdGF0aW9uU2VjcmV0IjoiNUl2SnpGckZHZGhqZlNrVGlQb1NKN3pablp0clV3MWUiLCJpbnZpdGVkSW5zdGFuY2VVaWQiO iJmMDYwYmE2Yy0xNTg5LTQxNDUtYTk2MS03MGIzNWUyMjgzZjQiLCJub2RlSW5mbyl6eyJuYW1lIjoibmFib28iLCJiYXNIVXJsIjoiaH R0cHM6Ly9qY2xvdWRub2RlLWxxZ2Ytb3Zzei14c250LXFicmEuZXhhbGF0ZS5jbG91ZClsImlzc3VlVHJhY2tlcIVybCl6Imh0dHBzOi8v bmFib28uYXRsYXNzaWFuLm5ldClsIm5vZGVUeXBlIjoiSklSQV9DTE9VRClsImlzc3VlVHJhY2tlcllcnNpb24iOiI3LjAuMCIsIm5vZGVB cHBWZXJzaW9uIjoiNy4wLjAiLCJub2RlVmVyc2lvbiI6IjUuMy4zliwiZXhhbGF0ZVBsdWdpbIZlcnNpb24iOiI1LjMuMylsIm1pbkh1Yk9ia mVjdHNWZXJzaW9uIjoiMS4yLjAiLCJtYXhldWJPYmplY3RzVmVyc2lvbiI6IjEuMTQuMCIsIm1pbpblJlc3RWZXJzaW9uIjoiMS4wLjAiLCJtY XhSZXN0VmVyc2lvbiI6IjUuMi4wliwicG9sbE9ubHkiOmZhbHNlLCJleGFDb21wVmVyc2lvbiI6IjUuMy40liwicmF3RXhhQ29tcFZlcnNp b24iOiI1LjMuNCIsImluc3RhbmNlVWlkIjoiODdiZWE2MWItYTk2Mi00YjdiLWI1NzUtZjE5MDRiOGU0ZDA3liwiZWRpdG9yljp7ImFkb WluUHJvb2VcmxUZW1wbGF0ZSI6Imh0dHBzOi8vbmFib28uYXRsYXNzaWFuLm5ldC9sb2dpbj9yZWRpcmVjdENvdW50PTUwXHUwMD NkMVx1MDAyNmRlc3QtdXJsXHUwMDNkaHR0cHM0ElMkYlMkZuYWJvby5hdGxhc3NpYW4ubmV0JTJGcGx1Z2lucyUyRnNlcn...

Next

14. 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 is established after the previous step.

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.*

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**.
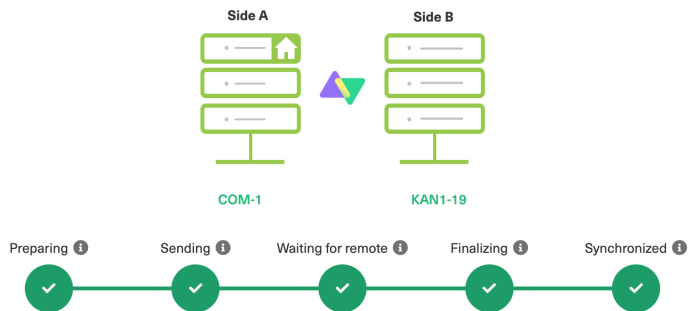
Exalate ✕

Connection established successfully ✓

Sync your first incident to see how it works.

Please enter an incident number to proceed

```
INC001
```

[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.

Resources

Academy ⬈

Blog ⬈

YouTube Channel ⬈

Ebooks ⬈

Still need help?

Join our Community ⬈

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