

Create a Connection in the New Exalate Console

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New Exalate console streamlines the process of creating connections between different work management systems. This guide walks you through creating a connection with automated system registration and configuration.

Before You Begin

To create a connection, you'll need:

- An active account in the new Exalate console with at least one Workspace
- Access credentials for the systems you want to connect

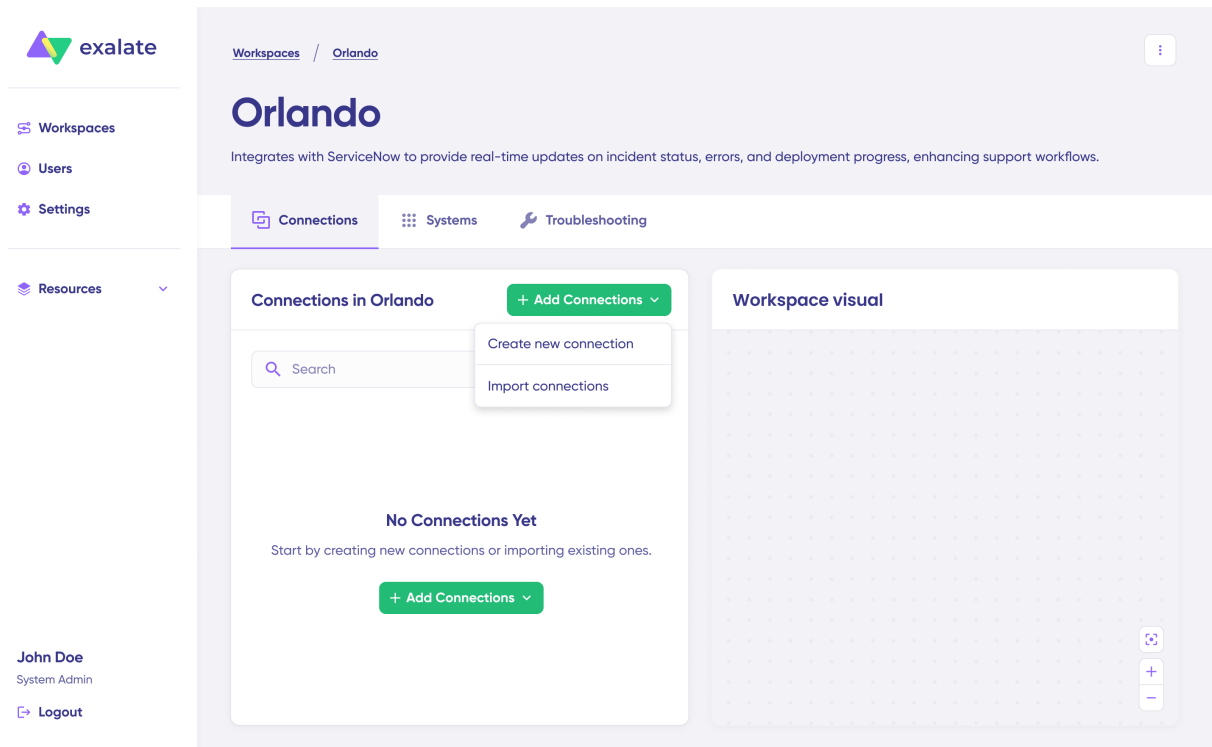
System Requirements:

- **For Azure DevOps:** A Personal Access Token (PAT) with Work Items (Read & Write) scope
- **For ServiceNow:** Username and password
- **For Freshdesk:** API key
- **For Freshservice:** API key
- **For Jira Cloud (Beta):** API key
- **For Zendesk:** API key
- **For Azure DevOps Server:** A Personal Access Token (PAT)

Note: Automated system registration currently supports **Azure DevOps, ServiceNow, Freshdesk, Freshservice, Jira Cloud (Beta), Zendesk, and Azure DevOps Server**. If you want to connect other systems like GitHub or Salesforce, you'll need to import them as [nodes](#) into your workspace first before creating a connection.

Start With the Connection Wizard

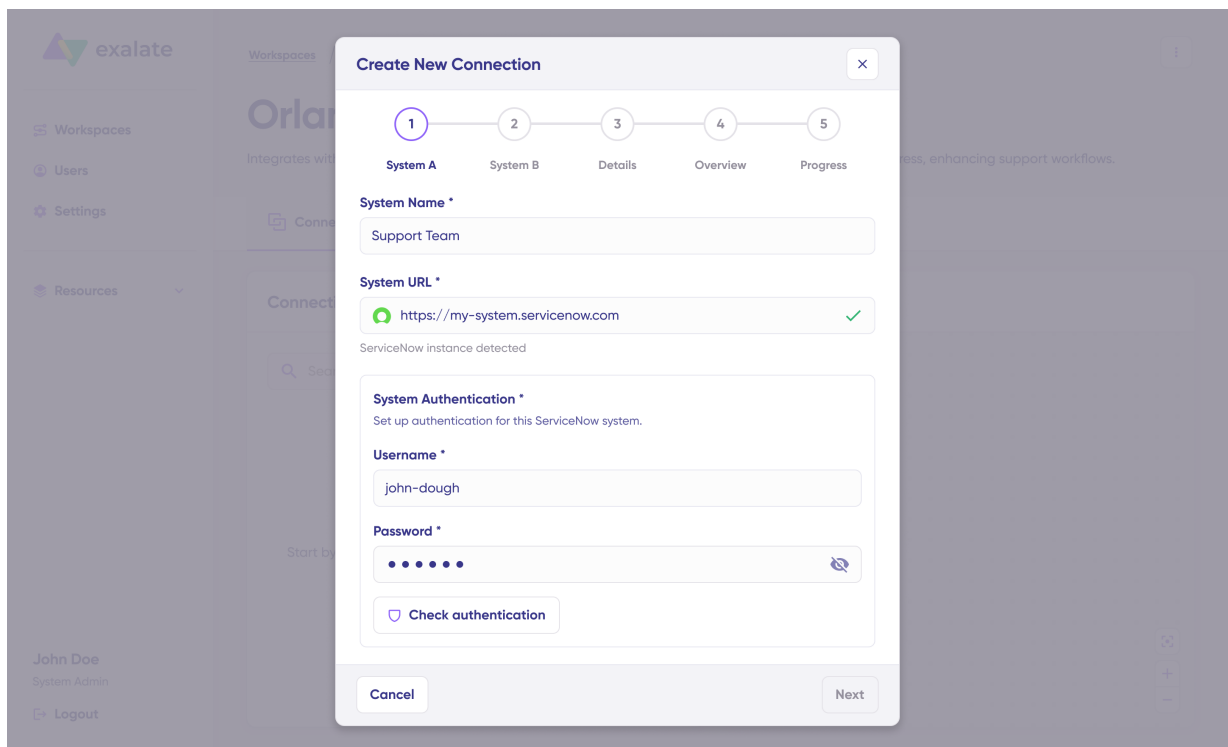
1. Log in to your account.
2. From the Workspaces list, select a workspace.
3. Click **Add Connections > Create New Connection**.



- The connection creation wizard opens, guiding you through a 5-step process.

Configure System A

1. Enter the system URL:



New Exalate console automatically detects the **system type** based on the URL you enter.

2. System status check:

When you enter a URL, we check if the system is already registered:

- If the system is already part of your workspace, you'll see a confirmation message and can skip authentication.
- If the system is registered but in a different workspace, you'll see: "System registered, but not yet part of Workspace." You can continue—the system will be added to your workspace during connection creation.
- If the system is new, authentication fields appear automatically.

3. Authenticate the system:

If authentication is required, provide your credentials:

- Enter your Personal Access Token (PAT), API key, or basic authentication details, depending on your system type.

Click **Check Authentication** and wait for validation. Once successful, the **Next** button becomes active.

The screenshot shows the 'Create New Connection' dialog box in the exalate application. The dialog has a progress bar at the top with five steps: 1. System A, 2. System B, 3. Details, 4. Overview, and 5. Progress. Step 1 is currently active. The form contains the following fields: 'System Name' with the value 'Support Team', 'System URL' with the value 'https://my-system.servicenow.com' and a green checkmark, and 'System Authentication' section with 'Username' 'john-dough' and 'Password' masked with dots. Below the password field, there is a message 'Successfully Authenticated' with a green checkmark. At the bottom, there are 'Cancel' and 'Next' buttons. The 'Next' button is green and active. The background shows the exalate interface with a sidebar containing 'Workspaces', 'Users', 'Settings', and 'Resources'. The main area shows 'Orlando' and 'Integrates with'.

4. Click Next to proceed to System B.

Configure System B

Follow the same steps as System A:

1. Enter the system URL for your second system.
2. Wait for automatic system type detection.
3. If required, provide authentication credentials.
4. Click **Check Authentication** to verify.
5. Click **Next** to continue.

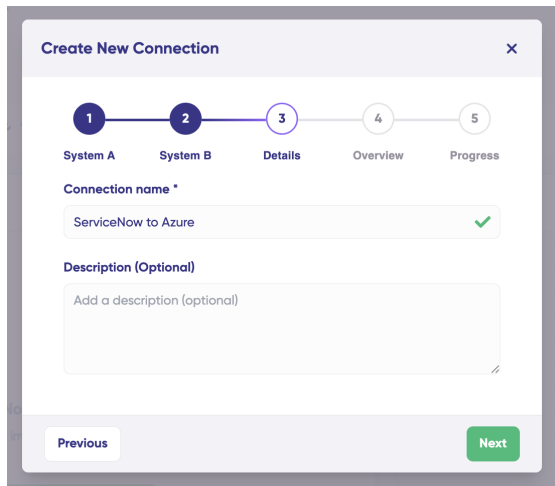
Name Your Connection

1. Connection name

Enter a unique, descriptive name for your connection. The name must be unique between these two systems.

Examples:

- "ADO-ServiceNow-ProductTeam"
- "Development-Support-Sync"



If this is not your first connection between the systems and the name already exists, you'll see an error message prompting you to choose a different name

2. Connection description (optional):

Add a brief description to help identify the connection's purpose, such as "Sync product development tasks between Azure DevOps and ServiceNow."

3. Click **Next** to review your configuration.

Review and Create

1. Review the details of your connection:

- **System A:** Verify the system type, URL, and authentication status
- **System B:** Verify the system type, URL, and authentication status
- **Connection Details:** Confirm the connection name and description

Create New Connection [X]

1 System A — 2 System B — 3 Details — 4 Overview — 5 Progress

Review Connection Setup
Review your setup before creating the connection

ServiceNow [Edit]
URL: https://dev230231.service-now.com/
Authentication: Username + Password

Azure [Edit]
URL: https://dev.azure.com/rambo500
Authentication: Personal Access Token

Connection Details [Edit]
Name: ServiceNow to Azure
Description: —

Previous **Create Connection**

2. Click **Create Connection** to begin the setup process.

Monitor Progress

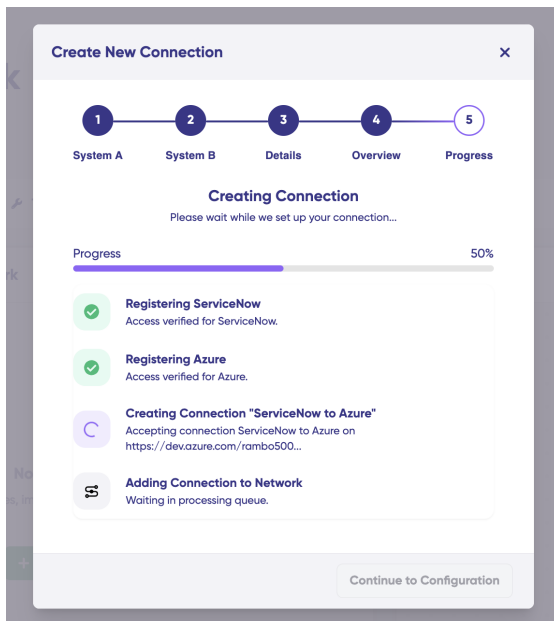
New Exalate automatically registers your systems and establishes the connection. You'll see real-time updates as the process completes:

System Registration:

- Validating credentials
- Checking for existing nodes
- Registering new nodes (if needed)
- Configuring node settings

Connection Establishment:

- Creating the bidirectional connection
- Finalizing setup



The progress screen shows the status of each step and an estimated time remaining. The process typically takes 1-2 minutes.

Tip: You can close the progress modal and navigate away—the process continues in the background. Your connection will appear in the Connections list with a "Building..." status until it's ready.

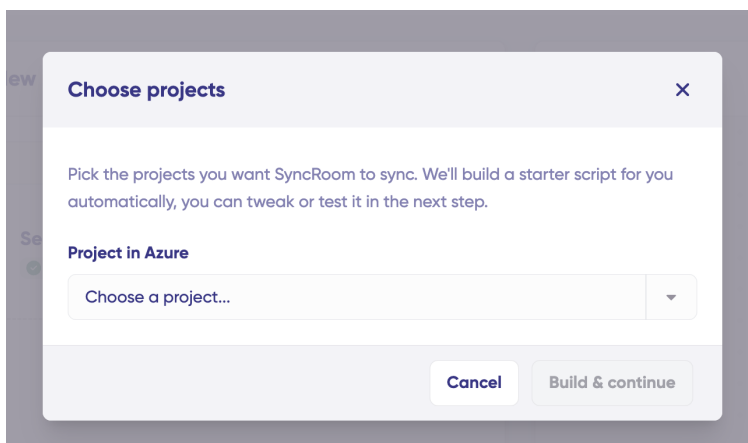
When the process completes, you'll see a success message, and your connection status will change to "Ready to configure."

What's Next?

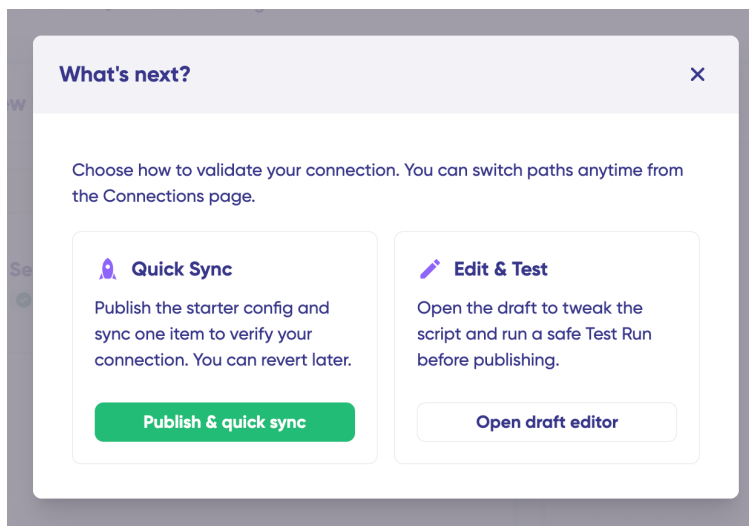
Once your connection is created, you'll need to configure it before it's ready to sync data:

1. Configure project selection: Choose which projects to sync between your systems.

Note: If the concept of a project does not exist in the given system, this modal will not be shown.



2. Test your connection: Use TestRun to validate your configuration before going live.



3. **Publish to production:** Activate the connection to begin syncing data.

Refer to the [Manage Connection Configuration](#) guide for detailed steps on configuring your connection.

ON THIS PAGE

[Before You Begin](#)

[Start With the Connection Wizard](#)

[Configure System A](#)

Product

[Configure System B](#)

[About Us](#)

[Review and Create](#)

[Glossary](#)

[Monitor Progress](#)

[API Reference](#)

[What's Next?](#)

[Security](#)

[Pricing and Licensing](#)

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