# Create a Connection in SyncRoom

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SyncRoom 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 in SyncRoom, you'll need:

- An active SyncRoom account with a Network
- 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

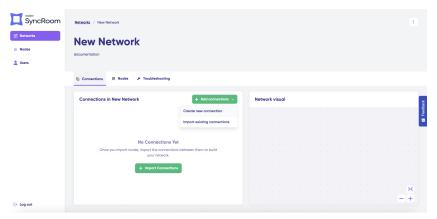
For Freshdesk: API keyFor Freshservice: API key

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

## Start With the Connection Wizard

- 1. Log in to your SyncRoom account.
- 2. From the Networks list, select your network.
- 3. Click Add Connections > Create New Connection.

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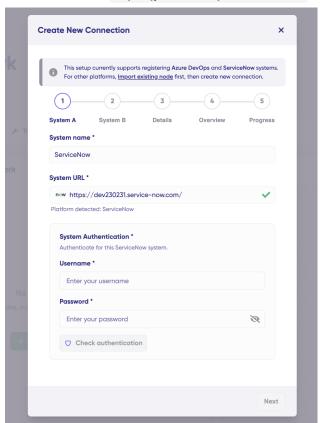


The connection creation wizard opens, guiding you through a 5-step process.

# Configure System A

### 1. Enter the system URL:

- For Azure DevOps: https://dev.azure.com/{your-organization}
- For ServiceNow: https://{your-instance}.service-now.com



SyncRoom automatically detects the **system type** based on the URL you enter.

#### 2. System status check:

When you enter a URL, SyncRoom checks if the system is already registered:

- If the system is already part of your network, you'll see a confirmation message and can skip authentication.
- If the system is registered but in a different network, you'll see: "System registered, but not

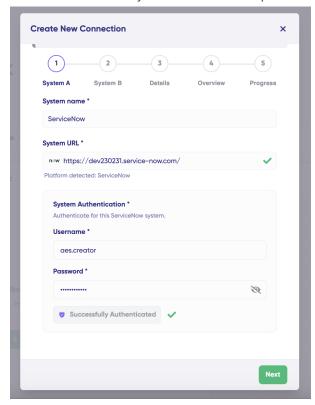
yet part of Network '[Your Network Name]'". You can continue—the system will be added to your network during connection creation.

• If the system is new, authentication fields appear automatically.

## 3. Authenticate the system:

If authentication is required, provide your credentials:

- Azure DevOps: Enter your Personal Access Token (PAT) with Work Items (Read & Write) scope.
- ServiceNow: Enter your username and password.



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

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.

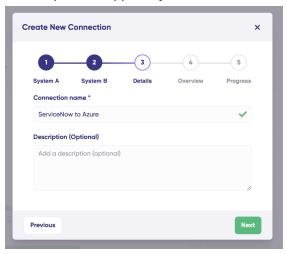
### Name Your Connection

#### 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

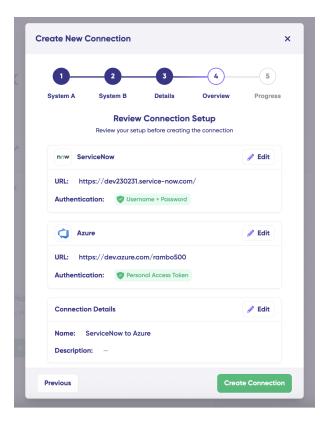
### 2. Connection description (optional):

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



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

# **Monitor Progress**

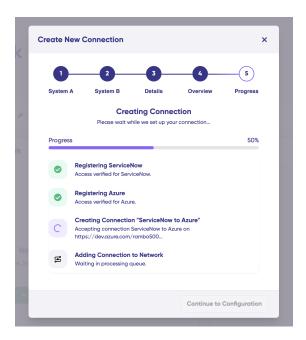
SyncRoom automatically registers your systems and establishes the connection. You'll see real-time updates as the process completes:

## **System Registration:**

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

#### **Connection Establishment:**

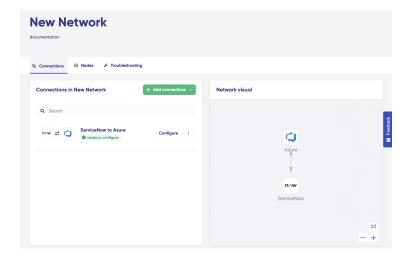
- Creating the bidirectional connection
- Finalizing setup



The progress screen shows the status of each step and an estimated time remaining. The process typically takes1-2 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.

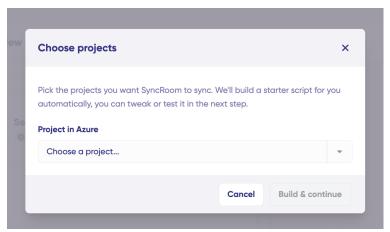
When the process completes, you'll see a success message, and your connection status will change to "Ready to configure."



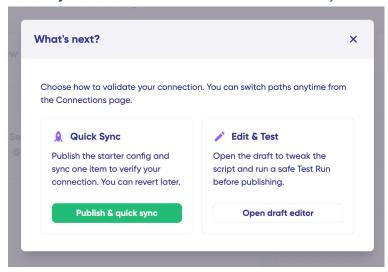
# What's Next?

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.

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