Delegate Authentication When Creating a Connection

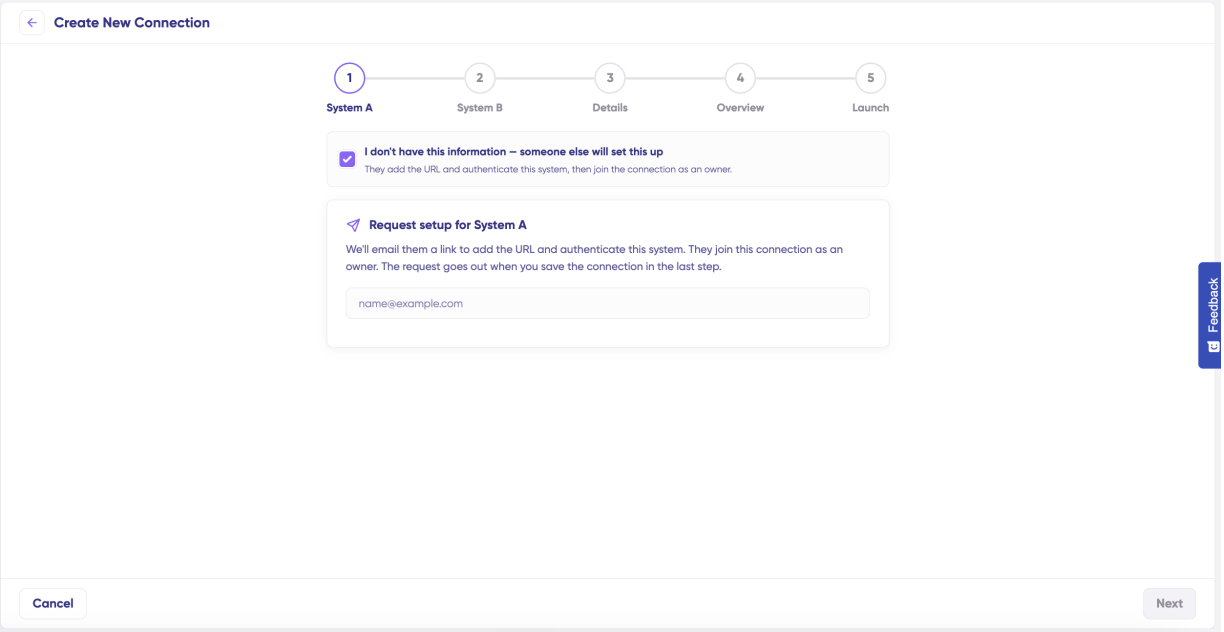
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You don't need access to both systems yourself to create a connection. If you don't have credentials for one — or either — you can invite someone else to configure it while you continue setting up the rest.

Delegate system authentication

1. Create a new connection.

2. On the **System A** or **System B** step of the connection wizard, check **"I don't have this information — someone else will set this up"**.



3. Enter the email address of the person who should configure this system.

You don't need a System URL or System name here — the person you invite adds those themselves when they authenticate.

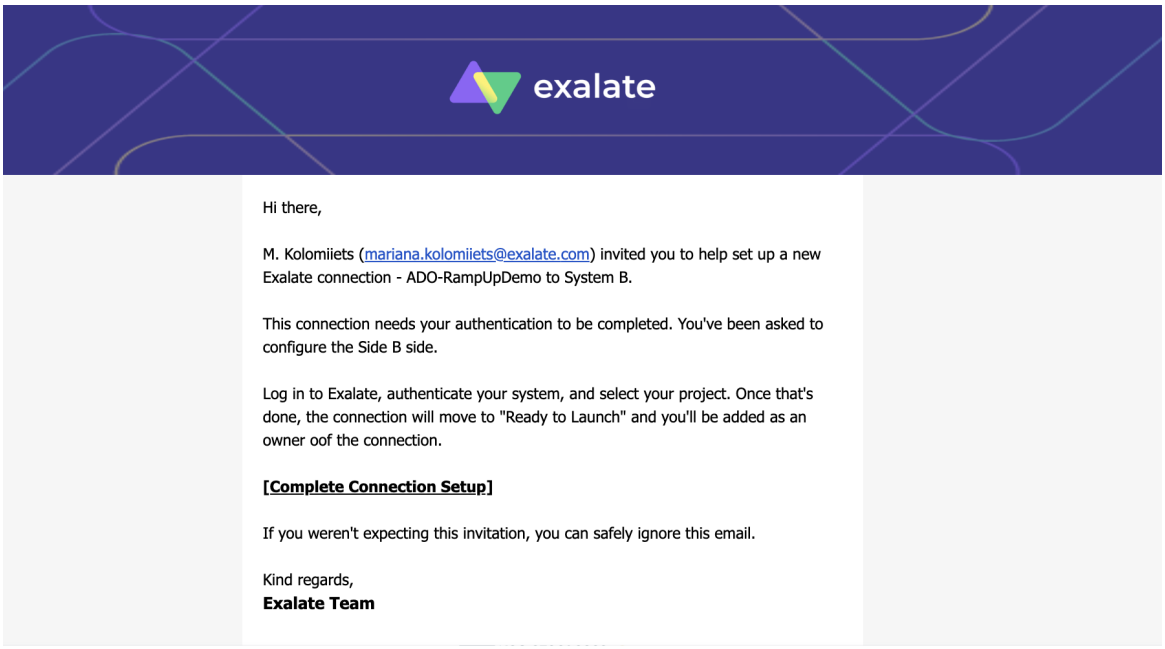
4. Click **Next** to continue. The rest of the wizard — Details, Overview — works the same whether or not a system is delegated.

You can delegate one system, the other, or both in the same setup. This comes in handy when, for example, a third-party consultant is setting up a connection between two customers' systems and doesn't have direct access to either one.

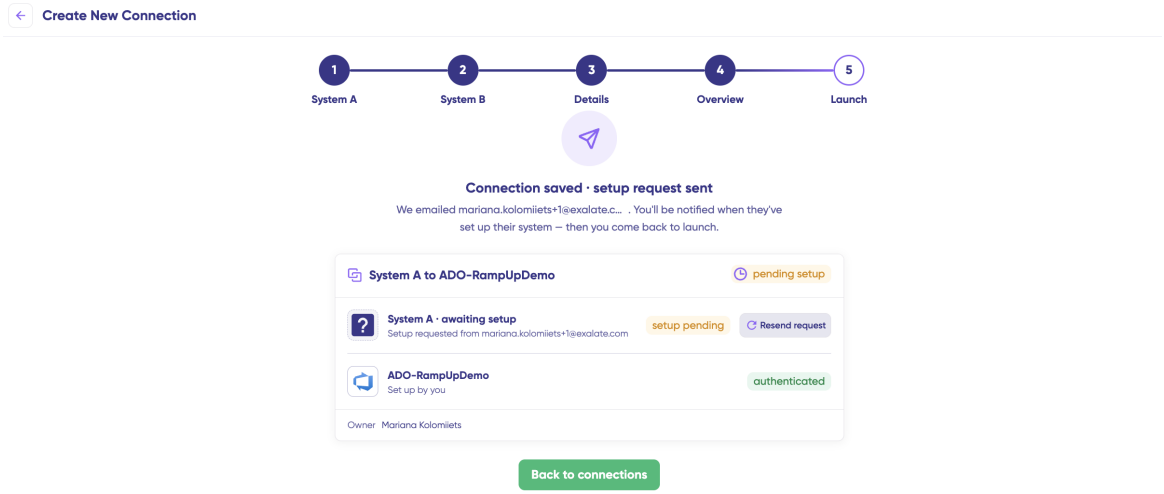
What happens next:

- Since not every system is authenticated yet, you're told the connection can't be launched until each delegated system is configured.
- The connection saves as a draft. It appears in your connections list clearly marked as pending information, so it's easy to tell apart from a connection that's ready to launch.

- Each person you delegated to gets an invitation email right away. The link in the email takes them straight to their part of the setup.



- If they don't already have a New Exalate account, they're guided through creating one first, then taken straight to their configuration step.
- Need to send a reminder? You can resend an invitation at any time by clicking **View** - **Resend request**.



What the invitee sees

The invitee lands on a screen naming who invited them, which connection, and which system they're configuring — with authentication offered for only that system.

If they're already signed in, they aren't asked to re-authenticate to New Exalate. The pending connection is also visible from their own connections list, not only via the emailed link.

Once they authenticate successfully, they're confirmed as done and told you'll be notified.

They join the connection as an Owner. Read more about what this means in Roles in New

Exalate.

Launching a connection with delegated authentication

- Launch isn't available until every delegated system has completed authentication.
- You're emailed when a delegated system is authenticated, and the connection updates live in your connections list once it's ready.
- Launching requires confirming a summary: connection name, both systems, their URLs, and their authentication methods.
- After launch, the connection is active for everyone on it, and each person's access to scripts, configuration, and versions matches their role — see Roles in New Exalate.

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