

Connect Operation

Last Modified on 04/29/2024 11:53 am EDT

With the **Connect** operation, you can sync 2 existing entities with each other. These entities can be in different projects or instances.

Once you connect issues using the Connect operation, all updates are synchronized automatically according to the sync rules specified in the connection. This article describes how to connect entities from the sync panel.

Note: At the moment, the sync panel is available only for Azure DevOps, Jira Cloud, Jira on-premise, Salesforce, and Zendesk. Use the Bulk Connect menu in the Exalate admin console for other platforms. You can also use it to sync entities in bulk in Exalate for Azure DevOps, Jira Cloud, Jira on-premise, Salesforce, and Zendesk. For more information, please read [Bulk Connect](#).

Note: For the Connect operation in ServiceNow and GitHub, use the **Entity Sync Status** on the left side of the screen.

Note: At the moment, there is a security vulnerability related to the Connect operation. To avoid it, we recommend making sure that the proxy user doesn't have access to private projects.

For more information read [Security Vulnerability -- You can access private project data with the Connect operation](#)

Connect Issues in Jira on-premise

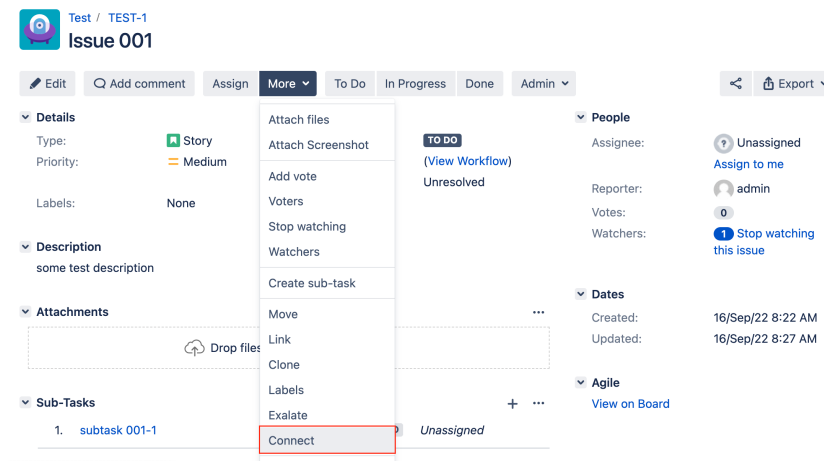
There are 2 ways to Connect issues in Exalate for Jira on-premise:

- **Connect** button on the issue view.
- **Bulk Connect** option in the Exalate admin menu.

Important: If the issues you want to connect existing comments, please use the **Bulk Connect** option in the Exalate admin menu.

To connect issues with the **Connect** button in Jira on-premise:

1. Open an issue you want to connect with an issue on the other side.
2. Select **More-> Connect** from the drop-down.



3. Enter the key of the remote issue you are connecting this issue within the **Remote issue URN** field.

A screenshot of the 'Connect an issue' form. At the top, it says 'By submitting this form, AS-1 will be connected to the selected remote issue towards the selected connection.' The 'Connection' dropdown is set to 'jira8_to_qa4'. Below it, there's a text input for 'Remote issue urn' with a placeholder 'Select the remote issue you want to connect to'. Under the 'Advanced Options' section, there are four checkboxes: 'Send all existing comments' (unchecked), 'Send all existing attachments' (unchecked), 'Send all existing worklogs' (unchecked), and 'Sync back' (unchecked). At the bottom, there are 'Submit' and 'Cancel' buttons.

4. Set up **Advanced options** if necessary.

This section allows specifying if existing comments, attachments, and work logs should be synced:

- **Send all existing comments**

The comments which existed before the issue is connected are sent over to the remote issue. The local data filter or remote change processor behavior is applied. For instance, if the relation specifies that local comments should remain local, then these is not sent over.

- **Send all existing attachments**

All attachments that existed before the issue is connected are sent over. The local data filter or remote change processor behavior is applied. For instance, if the

relation specifies that local attachments should remain local, then these are not sent over.

- **Send all existing worklogs**

All existing work logs are sent over. The local data filter or remote change processor behavior is applied. For instance, if the relation specifies that local worklogs should remain local, then these are not sent over.

- **Sync back**

When this option is selected, all information available on the other side is synced back to the local issue.

▼ **Advanced Options**

- | | | |
|-------------------------------|--------------------------|---|
| Send all existing comments | <input type="checkbox"/> | Synchronise existing comments when connecting the issues |
| Send all existing attachments | <input type="checkbox"/> | Synchronise existing attachments when connecting the issues |
| Send all existing worklogs | <input type="checkbox"/> | Synchronise existing worklogs when connecting the issues |
| Sync back | <input type="checkbox"/> | Request remote instance to send all information back |

5. Click **Submit** to connect issues.

Note: If you want to sync the existing comments, attachments, or worklogs, make sure you have configured advanced options before submitting.

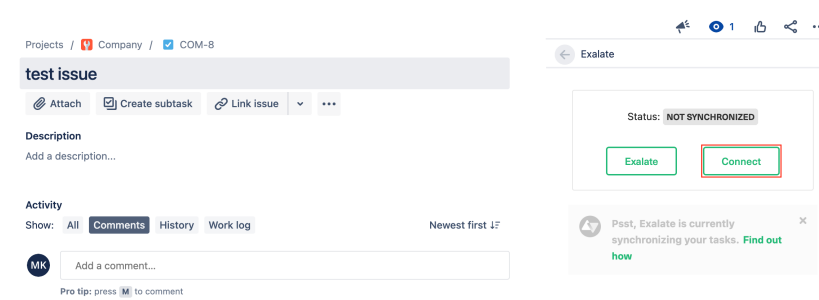
Connect issues in Jira Cloud

There are 2 ways to Connect issues in Exalate for Jira Cloud:

- **Connect** button on the issue view.
- **Bulk Connect** issues option in the Exalate admin menu.

Important: In case the issues you want to connect have existing comments, please use the **Bulk Connect issues** option in the Exalate admin menu.

1. Open an issue you want to connect to another issue.
2. Use the **Connect** button on the right sidebar (the operation is available only if the issue was not synchronized before).



3. Select a **Connection** from the drop-down.
4. Specify the key of the remote issue you are connecting with.
5. Activate additional sync options if necessary.

 The screenshot shows the 'Exalate' dialog box. It contains a message: 'You are about to connect the issue COM-8.' Below this is a 'Connection*' dropdown menu with 'Select a connection' and a downward arrow. Underneath is a 'Remote Issue Urn*' text input field. There are three toggle switches for 'Connect and sync data', 'Sync existing comments?', and 'Sync existing attachments?'. At the bottom, there are 'Cancel' and 'Connect' buttons.

6. Click the **Connect** button to connect issues.

Connect Work Items in Azure DevOps

There are 2 ways to connect work items in Exalate for Azure DevOps:

- **Connect** button on the work item view.
- **Bulk Connect** issues option in the Exalate admin menu.

You can connect Azure DevOps work items directly from the work item view.

To connect work items with the **Connect** button:

1. Open a work item you want to connect.
2. Select the **Exalate** dropdown in the **Details** tab.

✓ TASK 1509

1509 Test node

Yurii 1 comment Add tag

Status: To Do Reason: Added to backlog Area: Panama Iteration: Panama

Description

test update

Discussion

YK Add a comment. Use # to link a work item, ! to link a pull request, or @ to mention a person.

Planning

Priority: 2

Activity

Remaining Work

Exalate

3. Click **Connect**.

Description

test update

Discussion

YK Add a comment. Use # to link a work item, ! to link a pull request, or @ to mention a person.

Planning

Priority: 2

Activity

Remaining Work

Exalate

Status: NOT SYNCHRONIZED

Exalate Connect

4. Select a **Connection** from the dropdown.

Discussion

YK Add a comment. Use # to link a work item, ! to link a pull request, or @ to mention a person.

Remaining Work

Exalate

You are about to connect the issue 1509.

Connection*

Select a connection

Remote Issue Urn*

5. Enter the key of the remote issue you are connecting to in the **Remote Issue URN** field.

Description

test update

Discussion

YK Add a comment. Use # to link a work item, ! to link a pull request, or @ to mention a person.

Planning

Priority: 2

Activity

Remaining Work

Exalate

Connection*

Aqa002_to_Azure3

Remote Issue Urn*

6. Specify advanced options if necessary.

- **Connect and sync data**

If enabled, the local issue data is sent to the destination instance during sync.

- **Sync existing comments?**

If enabled, all existing comments are sent over. The source data filter or destination change processor behavior is applied. For instance, if the connection specifies that source comments should remain local, then these are not sent over.

- **Sync existing attachments?**

If enabled, all existing attachments are sent over. The source data filter or destination change processor behavior is applied. For instance, if the connection specifies that source attachments should remain local, then these are not sent over.

Discussion

Add a comment. Use # to link a work item, ! to link a pull request, or @ to mention a person.

Remaining Work

Exalate

2

Connect and sync data

Sync existing comments?

Cancel Connect

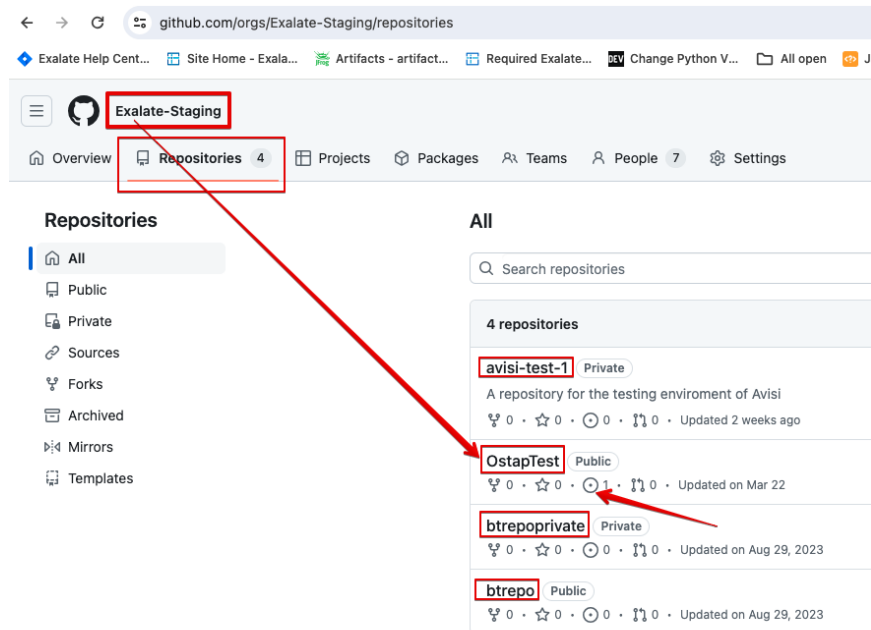
7. Click **Connect**.

Connect issues to GitHub

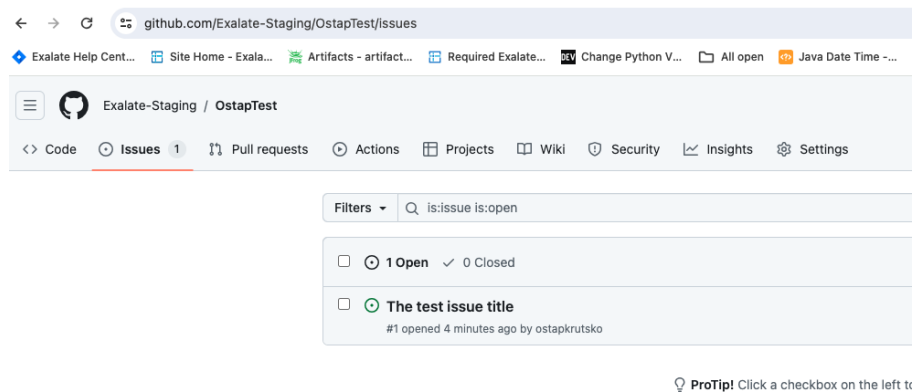
Important: When connecting entities to GitHub issues, please keep in mind that if the GitHub organization has more than one repository, the format to be used from the external instance should be: org/repoName-issue#, for example, exalate/public-43. In this example "43" is the entity URN.

TIP: How to find the Issue Number/Entity URN

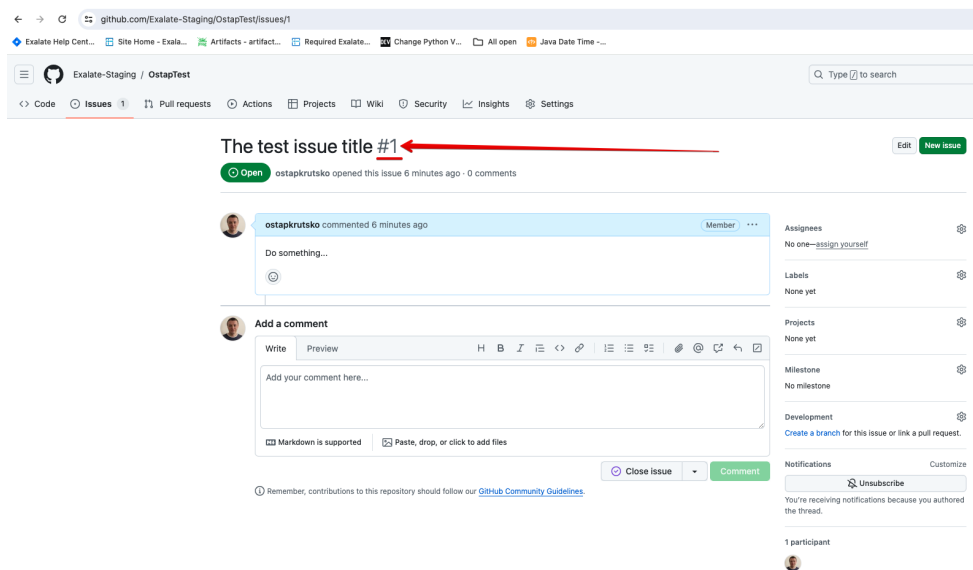
Let's use this repository as an example. The OstapTest repository has 1 issue. Note that the FullRepositoryName is Exalate-Staging/OstapTest.



When you click on the issue, you see:



Click a second time to get more details. In this example the URN is "1".



So, to make a connection from Github to jira Cloud, for example (could be another connector),

you need to append the URN (1) to the repository name, as shown below:

← Exalate

You are about to connect the issue PPS-1019.

*Connection

github_to_jcloud

*Remote Entity URN

Exalate-Staging/OstapTest-1

Connect and sync data

✓

Sync existing comments?

✓

Sync existing attachments?

✕

Cancel

Connect

ON THIS PAGE

- Product

Connect Issues in Jira on-premise

About Us
- Release History

Connect Issues in Jira Cloud

Glossary

Connect Work Items in Azure DevOps

API Reference
- Connect Issues to GitHub

Security
- Pricing and Licensing
- Resources

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