

Setting Up a Basic connection On a Project Level in Exalate for Jira Cloud

Last Modified on 01/15/2026 7:37 pm EST

Starting with version 5.2.0, not only Global administrators but also Project administrators can set up Basic connections right from the Project settings.

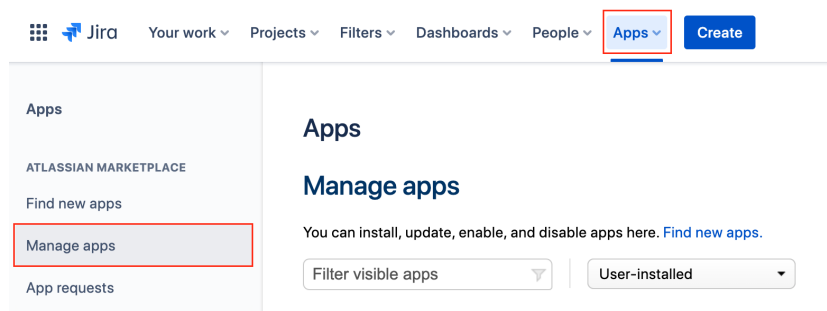
This article shows how to establish a Basic connection specifically on a Project level.

How to Enable Connection Set Up on a Project Level?

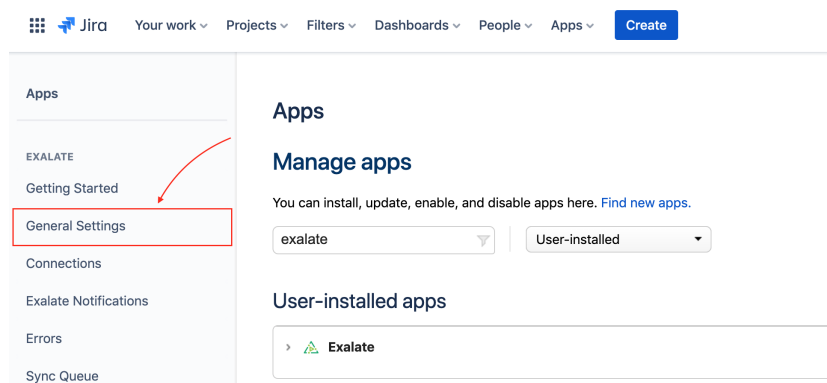
A Global administrator should enable connection set up on a Project level.

To enable Project level connections:

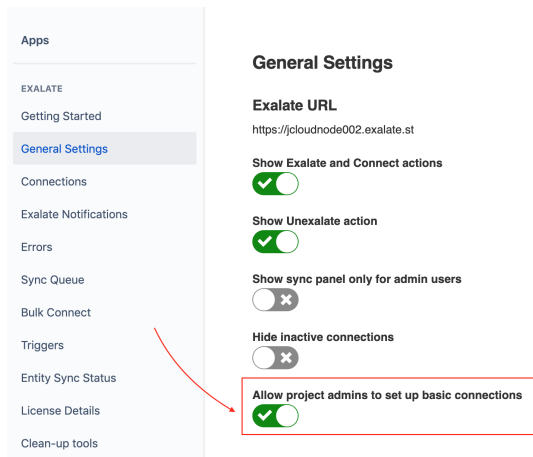
1. Go to **Apps** -> **Manage your apps**.



2. Under the Exalate menu click **General Settings**.



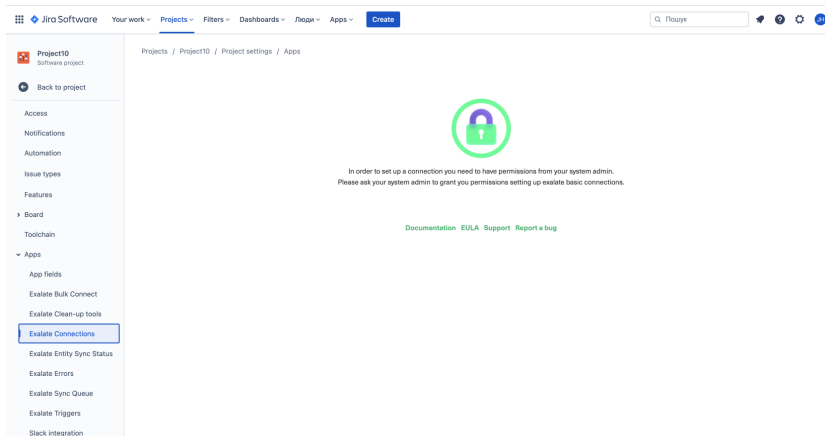
3. Enable the corresponding toggle to allow project admins to set up basic connections.



Once global admin enables this option, project admins assigned to the user group **exalate-project-level-administrators** is able to set up basic connections right from their Project settings.

Note: If the toggle is active, the following conditions apply:

- Users that belong to **exalate-project-level-administrators** group can use Exalate on a project level.
- If the user group **exalate-project-level-administrators** doesn't exist, all the Project admins are able to access Exalate from their Project settings.
- If the group exists but is empty, none of the project admins can use Exalate on a project level.
- If the group does not exist at all, all project admins can use Exalate on a project level.

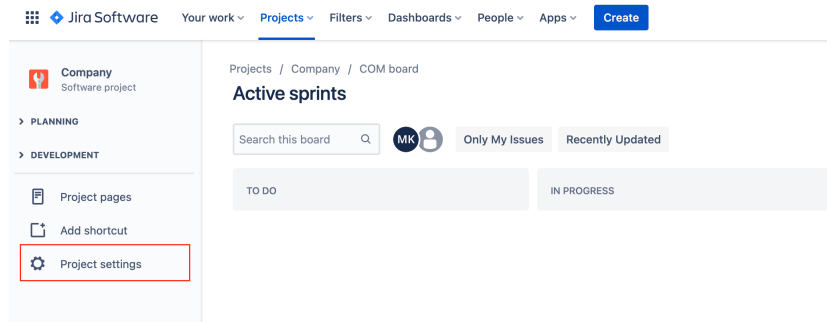


How to Initiate a Basic Connection from the Project Settings

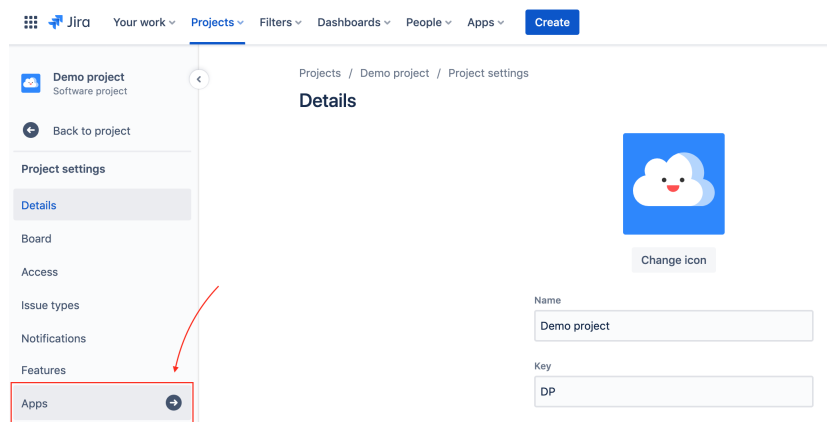
Basic connections have a set of sync rules, generated by Exalate. You can sync a basic set of issue fields: summary, description, comments, attachments, and issue types.

To initiate a Basic connection on a Project level:

1. Navigate to **Projects** and select your project from the list.
2. Click **Project settings** from the project menu sidebar.

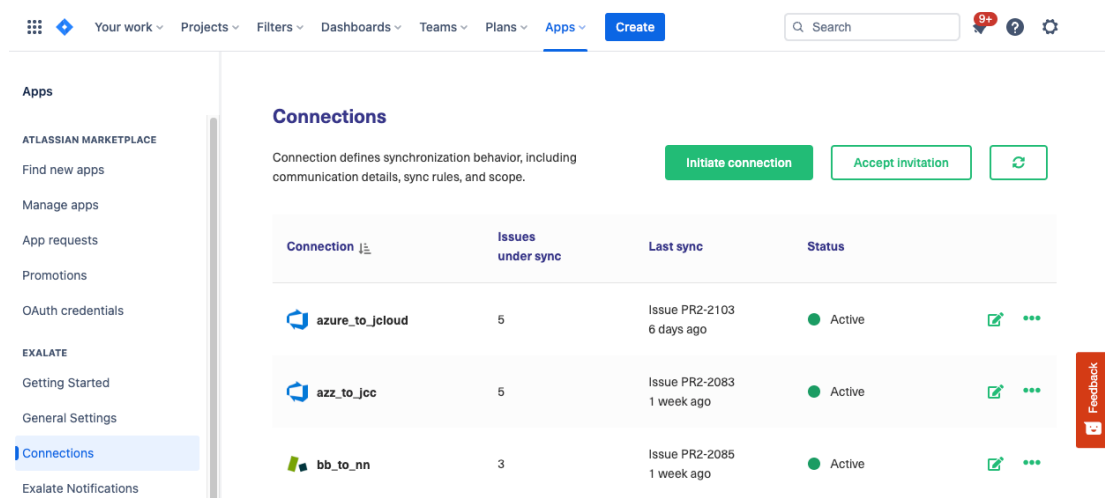


3. Click **Apps**.



Note: If you are in a company-managed project, there is no step 3, since the Exalate menu appears right in the **Project settings**.

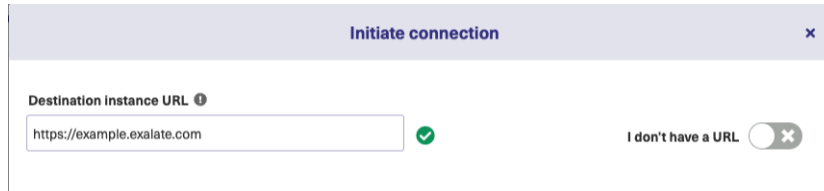
4. Click **Exalate connections** -> **Initiate connection**.



5. Specify if you have the link to the destination instance.

To set up a connection with an instance:

1. Enter the link to the destination instance in the **Destination instance URL** field. You can enter the link to the instance you are trying to connect, or the **Exalate URL** from [General Settings](#). If you enter a link to your instance, Exalate determines it's a [local connection](#) between two projects within your instance.



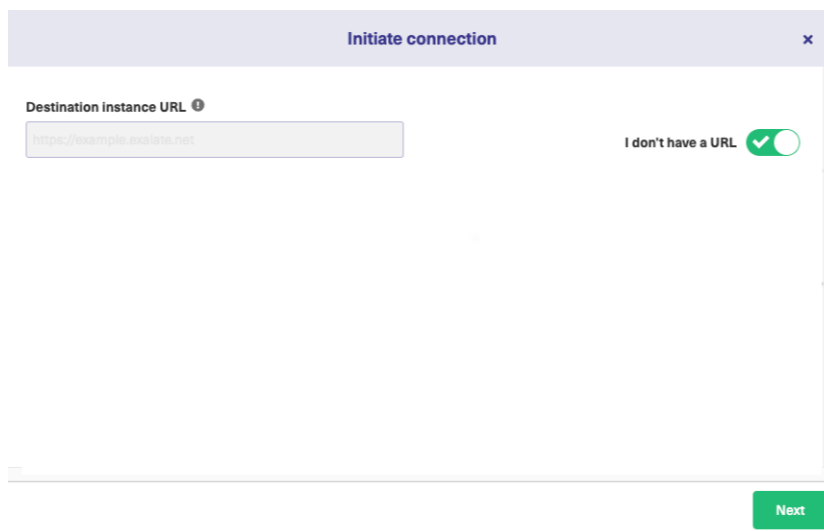
Initiate connection

Destination instance URL ⓘ

https://example.exalate.com ✓

I don't have a URL ☐

2. Click **I don't have a URL** if the destination instance is in a private network, or you don't have the link.



Initiate connection

Destination instance URL ⓘ

https://example.exalate.net

I don't have a URL ☒ ✓

Next

3. Exalate suggests available configuration types based on the destination instance's version of Exalate.

Select the appropriate tab below:

The Destination Instance URL is Known

4. Click **Initiate**

Important: Basic connections cannot be initiated if the destination instance has an older Exalate version.

Initiate connection

Destination instance URL ⓘ

☒
I don't have a URL ☐

Choose the configuration type

Basic

- Automatic configuration of basic fields
- Sync rules cannot be edited
- Only Issues can be synced
- Recommended for use cases of basic complexity

BETA
Visual

- Low-code, visual interface
- Configure both sides of the connection using a single interface
- Recommended for use cases of basic to intermediate complexity

Script

- Groovy-based scripting
- Configure each side of the connection separately
- Recommended for use cases of basic to advanced complexity

Initiate

5. Specify if you have admin access to the destination instance

If You have Admin Access to the Destination Instance

Note: Complete the following steps on the destination instance.

6. Click **Initiate**.

Initiate connection

Do you have admin access to the destination instance?

☒
Yes, I have admin access

- You will be redirected to the destination instance to establish the connection

☐
No, I don't have admin access

- You will generate an invitation and send it to the destination instance admin to establish the connection

[< Previous](#)
Initiate

You are automatically redirected to the destination instance to log in. If the redirection was not successful, click **Go to remote**.

Initiate connection

Do you have admin access to the destination instance?

Yes, I have admin access

• You will be redirected to the destination instance to establish the connection

No, I don't have admin access

• You will generate an invitation and send it to the destination instance admin to establish the connection

< Previous

Go to remote

Note: Complete the following steps on the destination instance.

7. Select a project for the incoming sync.

You can select one of the projects you have admin access.

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

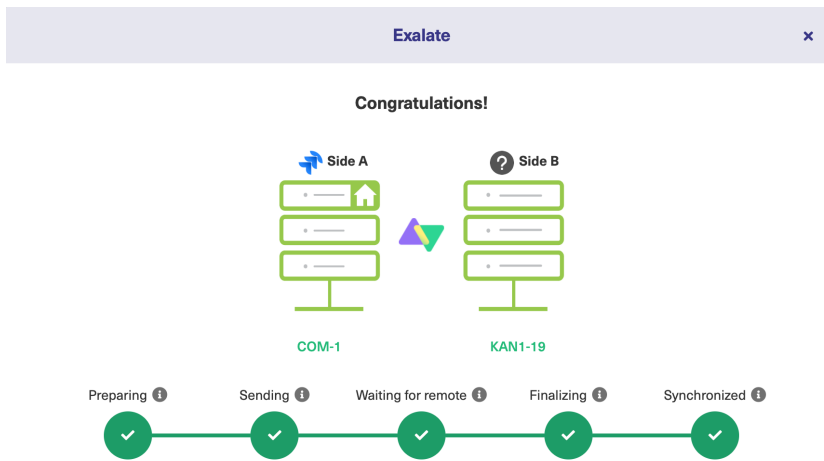
Confirm

8. Click **Confirm**.

After establishing the connection, you can sync your first issue in Exalate to see how it works: enter an issue key and click **Exalate**. Or you can click  to close the window and sync an issue on your own:

- By [Connecting an issue](#).
- By [Syncing issues in bulk](#).
- By creating a [trigger](#).

When syncing your first issue, you see the status of your sync.



If You Don't have Admin Access to the Destination Instance

6. Click **Initiate**

Initiate connection ×

Do you have admin access to the destination instance?

☒ **Yes, I have admin access**

- You will be redirected to the destination instance to establish the connection

☐ **No, I don't have admin access**

- You will generate an invitation and send it to the destination instance admin to establish the connection

[< Previous](#) Initiate

7. Click **Copy Invitation code**.

You can send the invitation code to the destination instance admin.

8. Click **Done**.

9. Click **Accept Invitation**.

10. Paste the invitation code.

11. Click **Next**.

11. Select a project for the incoming sync.

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.

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Please select the project where you want to create entities, received from the other side.*

Select Project

< Previous

Confirm

12. Click **Confirm**.

After establishing the connection, you can sync your first issue in Exalate to see how it works: enter an issue key and click **Exalate**. Or you can click  to close the window and sync an issue on your own:

- By [Connecting an issue](#).
- By [Syncing issues in bulk](#).
- By creating a [trigger](#).

Exalate

Connection established successfully ✓

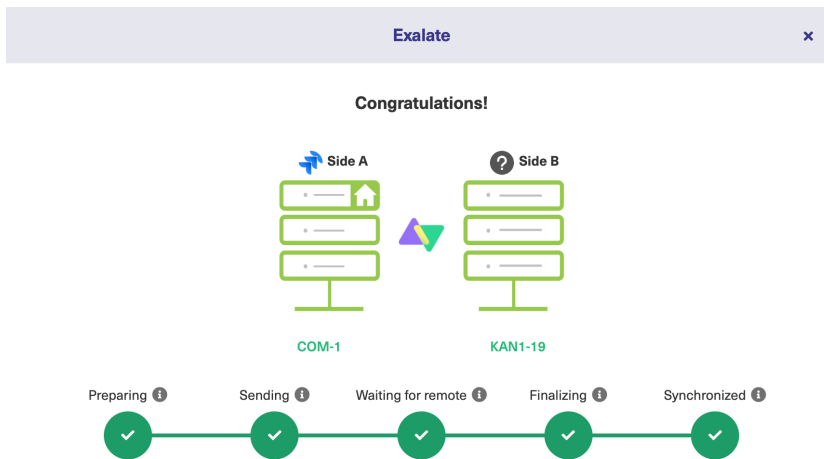
Sync your first issue to see how it works.

Please enter an issue key from the project **Test (TEST)** to proceed

TEST-1

Exalate

When syncing your first issue, you see the status of your sync.



The Destination Instance URL is Not Known

4. Click **Initiate**

You can still set up a connection and send an invitation to connect to the destination instance administrator.

The "Initiate connection" dialog box has a title bar with a close button. It contains a "Destination instance URL" field with the text "https://example.exalate.com" and a green checkmark icon. To the right of the field is a toggle switch labeled "I don't have a URL" which is currently turned off. Below the URL field, there is a section titled "Choose the configuration type" with three options: "Basic", "Visual", and "Script". The "Basic" option is highlighted with a green border and includes a list of features: "Automatic configuration of basic fields", "Sync rules cannot be edited", "Only Issues can be synced", and "Recommended for use cases of basic complexity". The "Visual" option is marked as "BETA" and includes a list of features: "Low-code, visual interface", "Configure both sides of the connection using a single interface", and "Recommended for use cases of basic to intermediate complexity". The "Script" option includes a list of features: "Groovy-based scripting", "Configure each side of the connection separately", and "Recommended for use cases of basic to advanced complexity". At the bottom right of the dialog is a green "Initiate" button.

5. Click **Copy Invitation code**.

6. Click **Done**.

7. Click **Accept Invitation**.

8. Paste the invitation code.

9. Click Next.

10. Select a project for the incoming sync.

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

11. Click **Confirm**.

After establishing the connection, you can sync your first issue in Exalate to see how it works: enter an issue key and click **Exalate**. Or you can click  to close the window and sync an issue on your own:

- By [Connecting an issue](#).
- By [Syncing issues in bulk](#).
- By creating a [trigger](#).

Exalate

Connection established successfully ✓

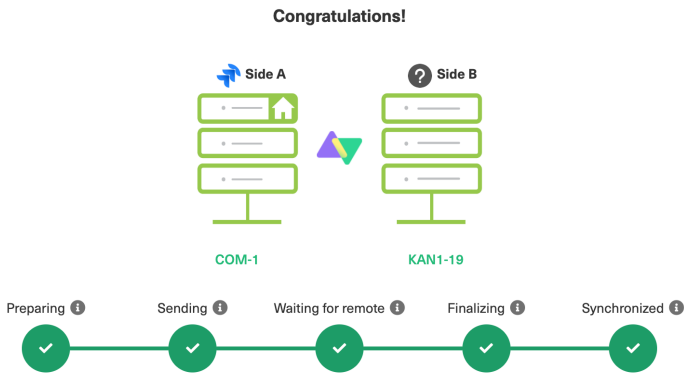
Sync your first issue to see how it works.

Please enter an issue key from the project **Test (TEST)** to proceed

TEST-1

Exalate

When syncing your first issue, you can see the status of your sync:



Have more questions? [Ask the community](#)

Note: Complete the following steps on the destination instance.

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