

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.

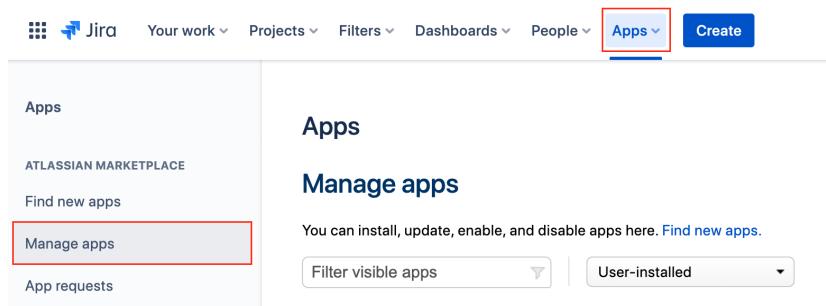
This article shows how to establish a Basic connection specifically on a Project level.

How to Enable Connection Set Up on a Project Level?

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

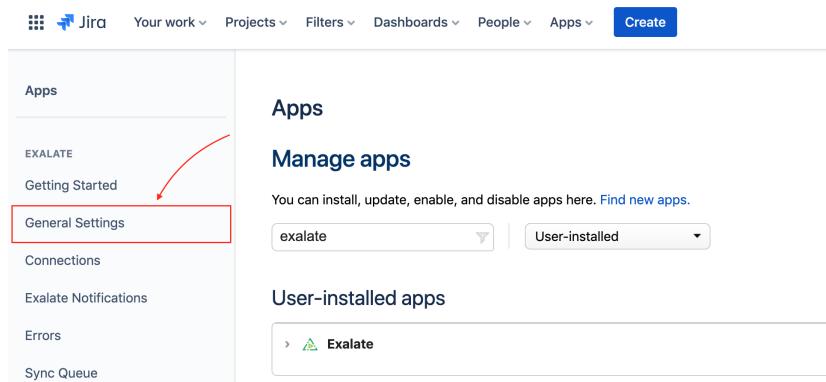
To enable Project level connections:

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



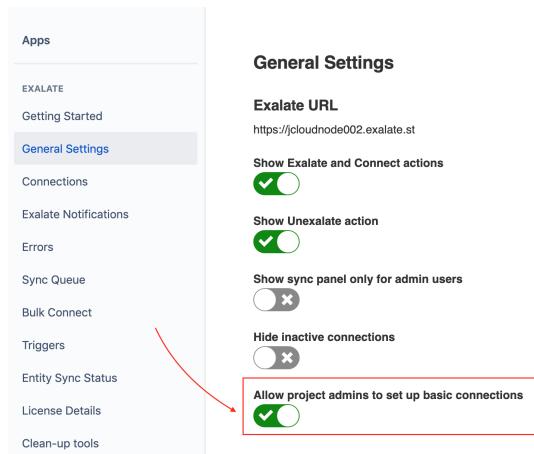
The screenshot shows the Jira 'Manage your apps' interface. The top navigation bar includes 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', 'Apps' (which is highlighted with a red box), and a 'Create' button. The left sidebar has a 'Apps' section with 'EXALATE' subsections: 'Getting Started' and 'General Settings' (which is also highlighted with a red box). The main content area is titled 'Manage apps' with a sub-instruction: 'You can install, update, enable, and disable apps here. [Find new apps](#)'. It features a search bar with 'exalate' and a filter dropdown set to 'User-installed'.

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



The screenshot shows the 'General Settings' page under the 'EXALATE' menu. The left sidebar shows 'EXALATE' with 'Getting Started' and 'General Settings' (highlighted with a red box and a red arrow from the previous screenshot). The main content area is titled 'Manage apps' with a search bar containing 'exalate' and a filter dropdown set to 'User-installed'.

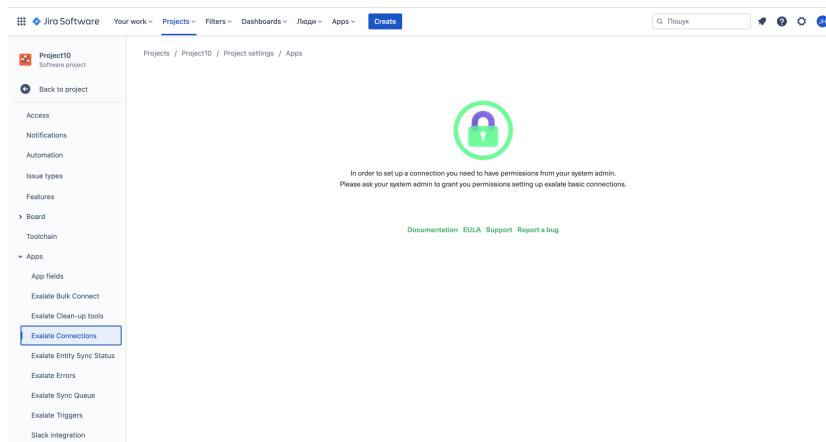
3. Enable the corresponding toggle to allow project admins to set up basic connections.



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.



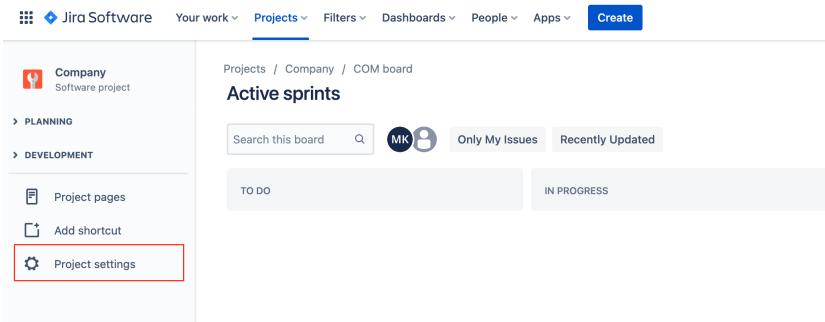
How to Initiate a Basic Connection from the Project Settings

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:

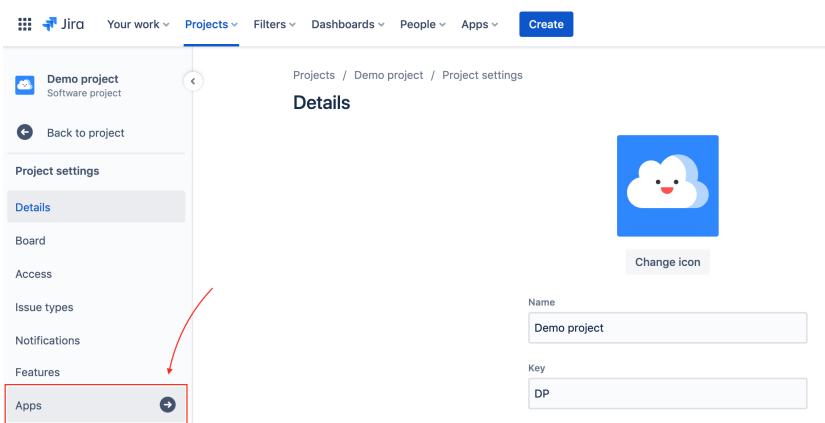
1. Navigate to **Projects** and select your project from the list.

2. Click **Project settings** from the project menu sidebar.



The screenshot shows the Jira Software interface. The top navigation bar includes 'Jira Software', 'Your work', 'Projects' (which is the active tab), 'Filters', 'Dashboards', 'People', 'Apps', and a 'Create' button. Below the navigation is a project board for 'Company Software project'. The sidebar on the left contains 'Planning', 'Development', 'Project pages', 'Add shortcut', and 'Project settings', with 'Project settings' highlighted by a red box. The main area shows 'Active sprints' with 'TO DO' and 'IN PROGRESS' columns.

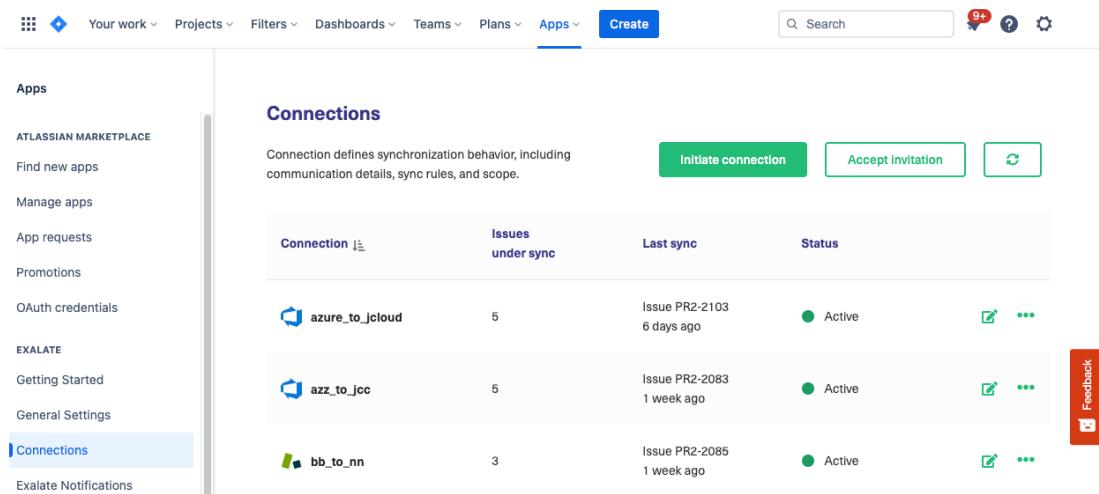
3. Click **Apps**.



The screenshot shows the 'Project settings' screen for the 'Demo project'. The left sidebar lists 'Details', 'Board', 'Access', 'Issue types', 'Notifications', 'Features', and 'Apps', with 'Apps' highlighted by a red box. The main area shows the 'Details' section for the project, including a cloud icon, a 'Change icon' button, a 'Name' field containing 'Demo project', and a 'Key' field containing 'DP'.

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**.

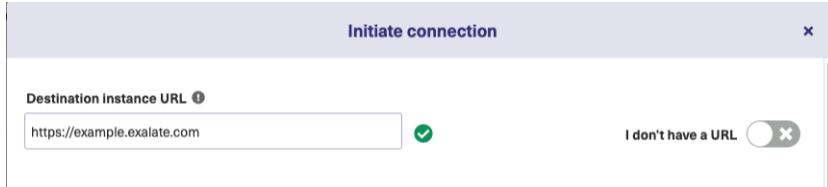


The screenshot shows the 'Connections' screen in the Jira Software 'Apps' section. The left sidebar includes 'ATLASSIAN MARKETPLACE' (Find new apps, Manage apps, App requests, Promotions, OAuth credentials), 'EXALATE' (Getting Started, General Settings), and 'Connections' (which is the active tab). The main area shows a table of connections with columns: 'Connection' (with a dropdown arrow), 'Issues under sync', 'Last sync', and 'Status'. Three connections are listed: 'azure_to_jcloud' (5 issues, last sync 6 days ago, Active), 'azz_to_jcc' (5 issues, last sync 1 week ago, Active), and 'bb_to_nn' (3 issues, last sync 1 week ago, Active). A 'Feedback' button is located in the bottom right corner of the main area.

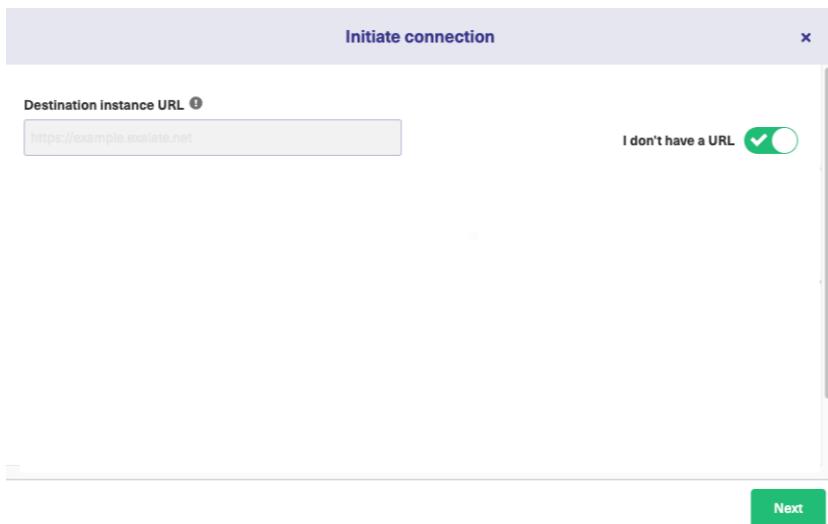
5. Specify if you have the link to the destination instance.

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.



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



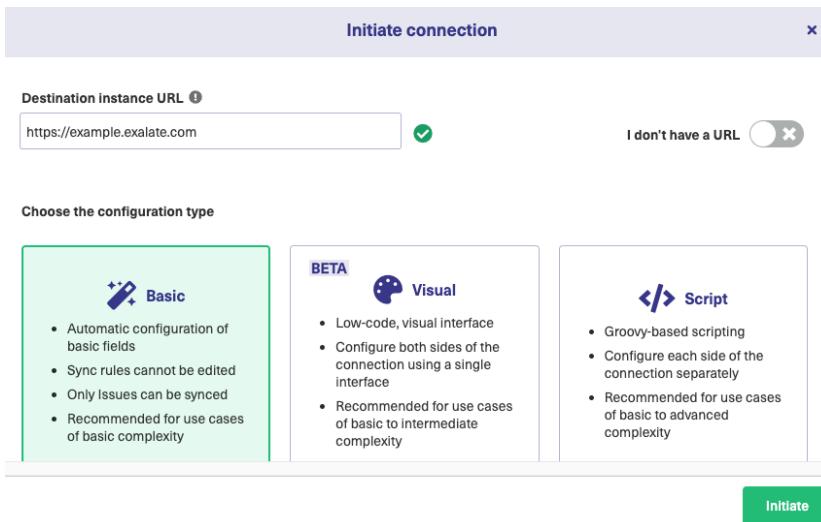
3. Exalate suggests available configuration types based on the destination instance's version of Exalate.

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.

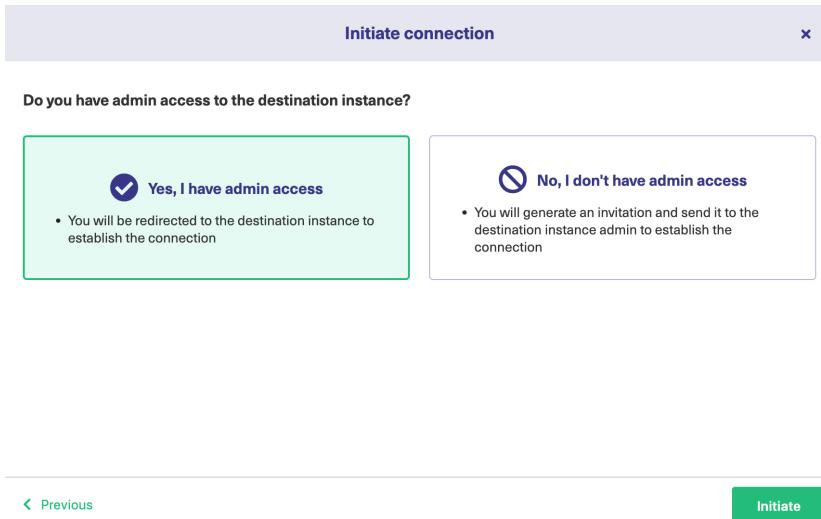


5. Specify if you have admin access to the destination instance

If You have Admin Access to the Destination Instance

Note: Complete the following steps on the destination instance.

6. Click **Initiate**.



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

Initiate connection x

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 x

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.*

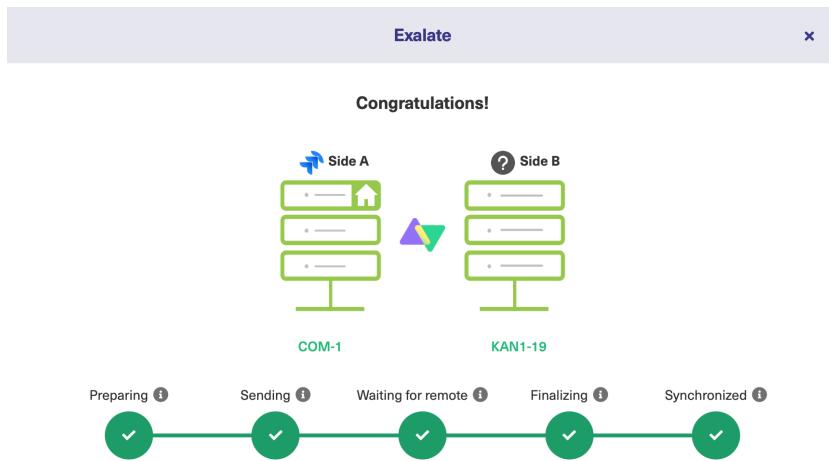
◀ Previous Confirm

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 x to close the window and sync an issue on your own:

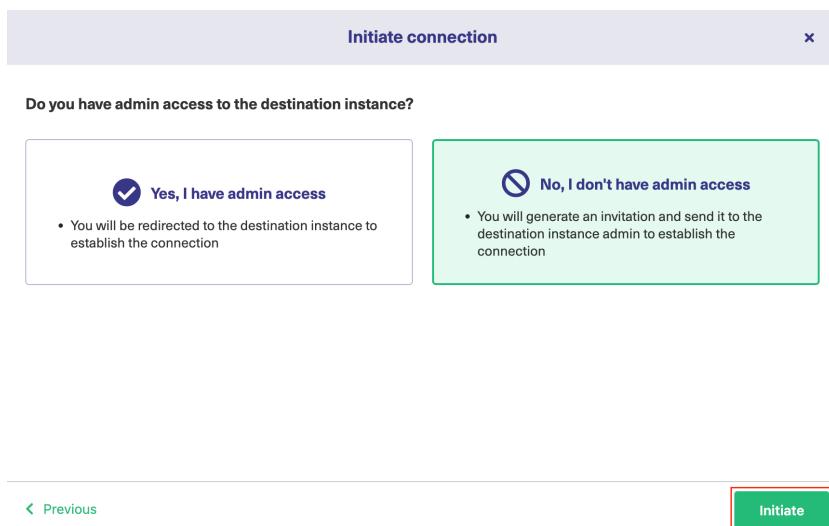
- By [Connecting an issue](#).
- By [Syncing issues in bulk](#).
- By [creating a trigger](#).

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



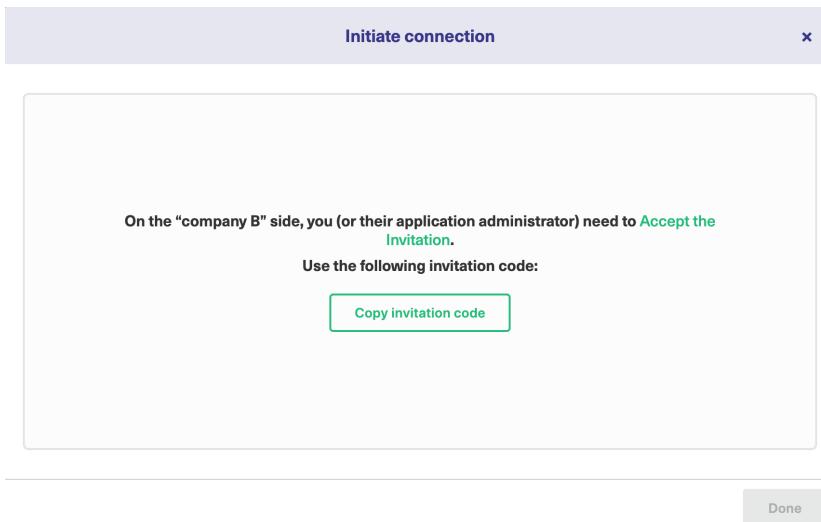
If You Don't have Admin Access to the Destination Instance

6. Click **Initiate**

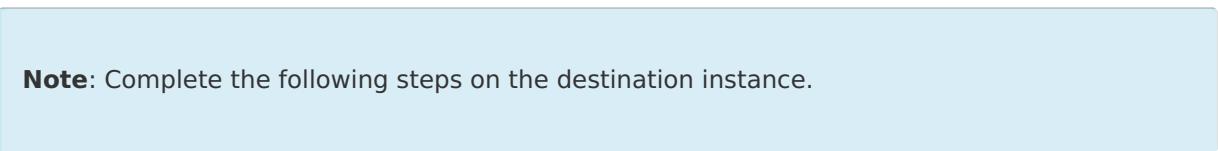


7. Click **Copy Invitation code**.

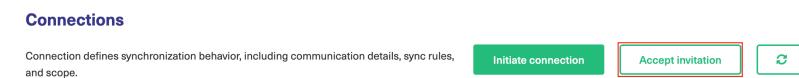
You can send the invitation code to the destination instance admin.



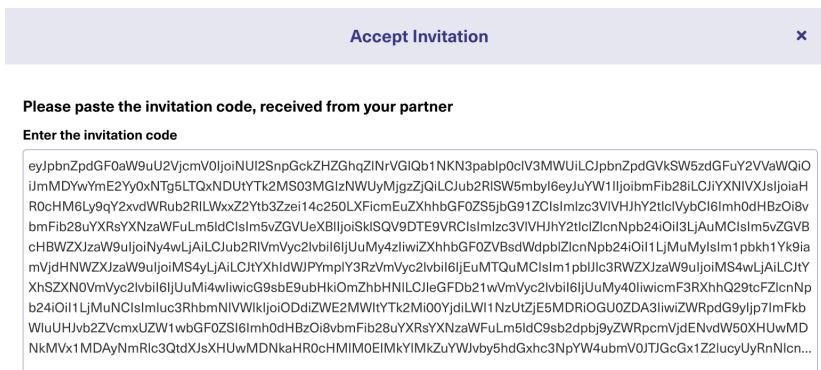
8. Click **Done**.



9. Click **Accept Invitation**.

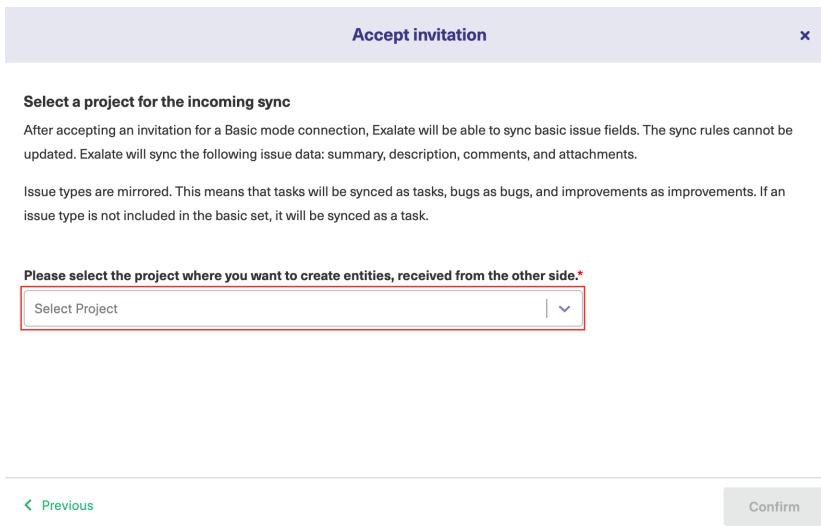


10. Paste the invitation code.



11. Click **Next**.

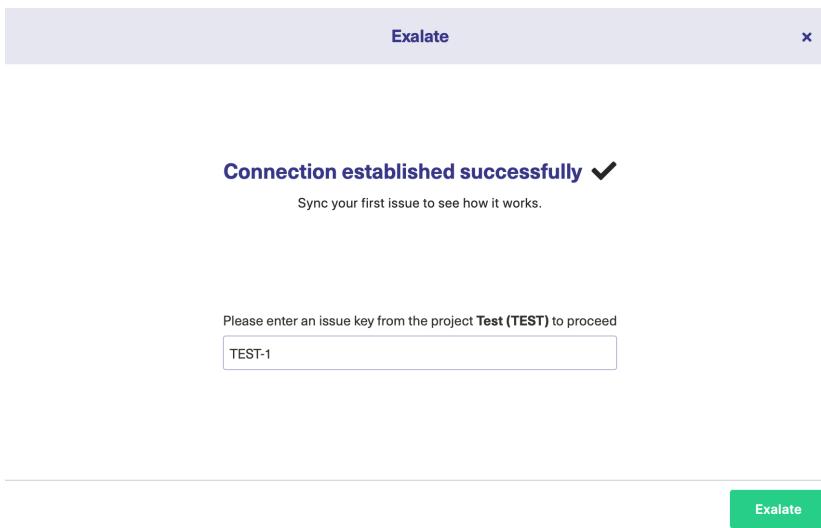
11. Select a project for the incoming sync.



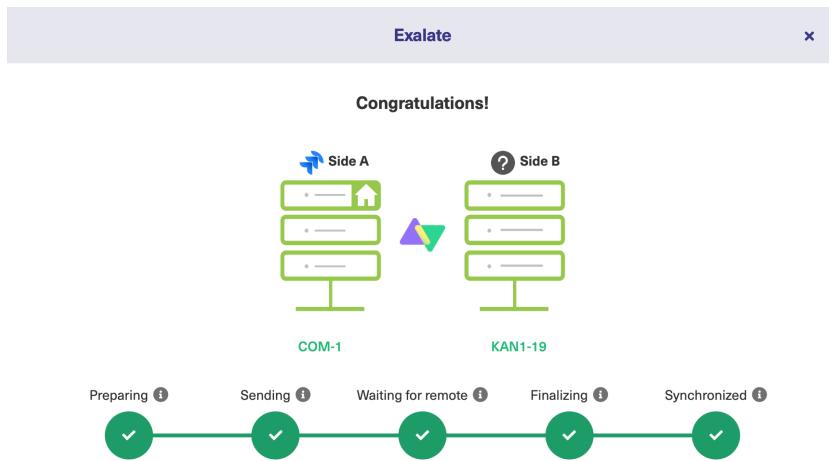
12. Click **Confirm**.

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 **x** to close the window and sync an issue on your own:

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



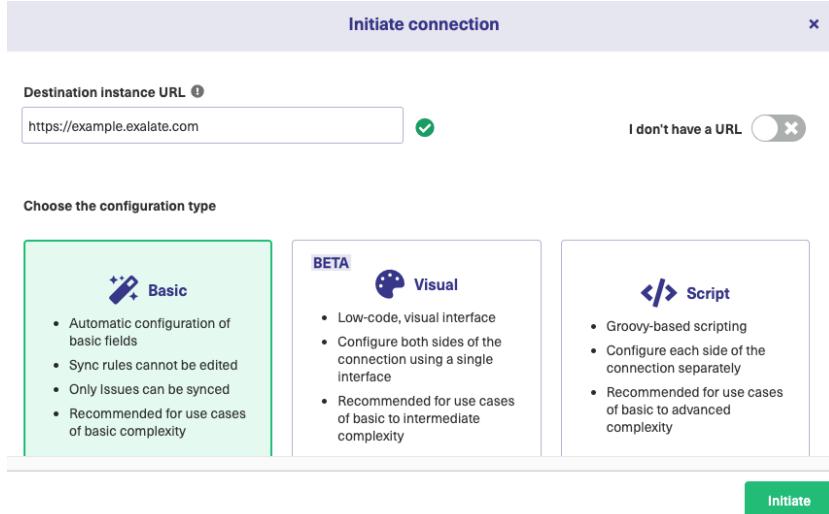
When syncing your first issue, you see the status of your sync.



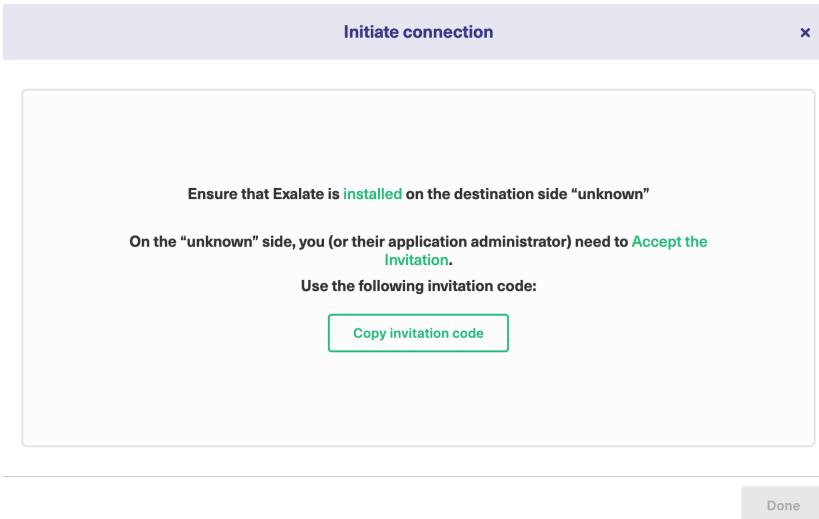
The Destination Instance URL is Not Known

4. Click **Initiate**

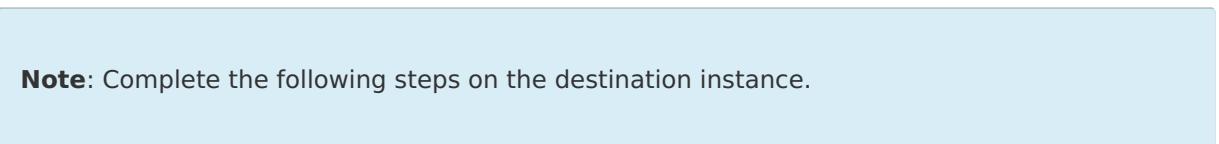
You can still set up a connection and send an invitation to connect to the destination instance administrator.



5. Click **Copy Invitation code**.



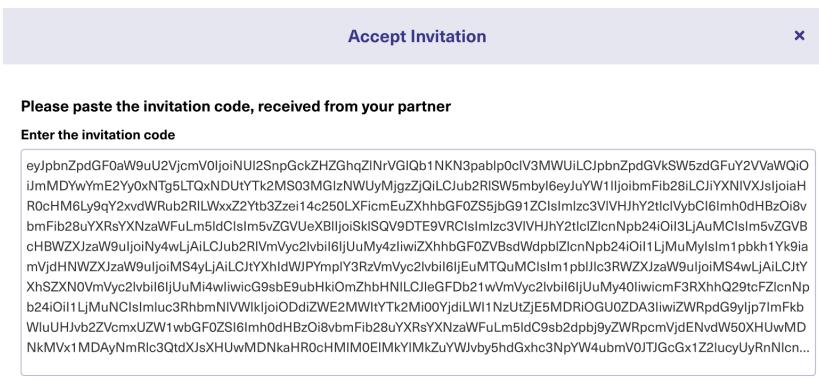
6. Click **Done**.



7. Click **Accept Invitation**.

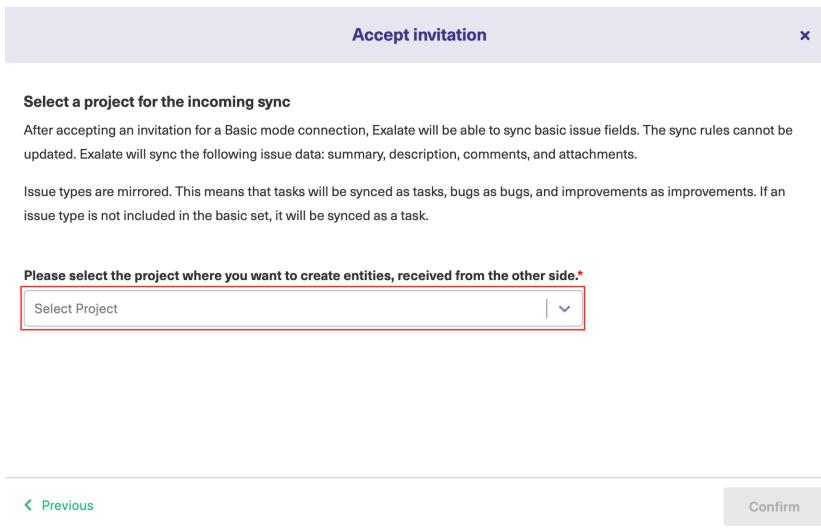


8. Paste the invitation code.



9. Click **Next**.

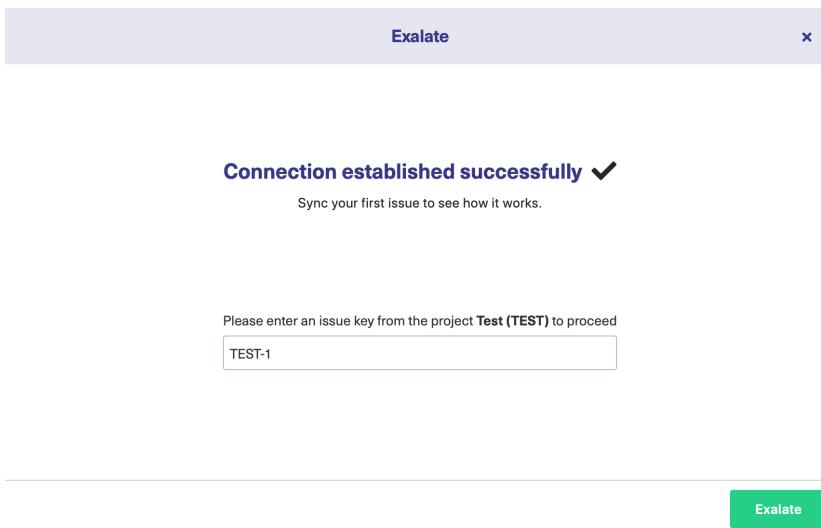
10. Select a project for the incoming sync.



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 **x** to close the window and sync an issue on your own:

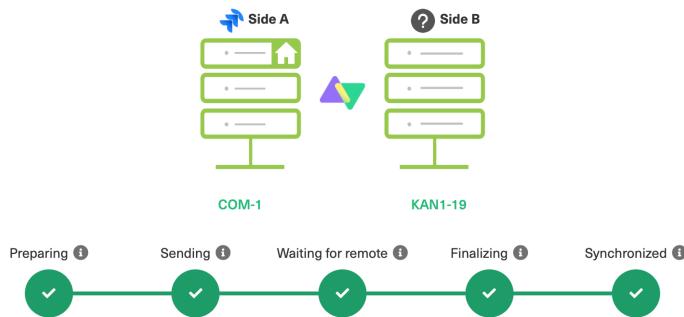
- By [Connecting an issue](#).
- By [Syncing issues in bulk](#).
- By [creating a trigger](#).



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



Congratulations!



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

Note: Complete the following steps on the destination instance.

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