Initiate a Connection for HP ALM/QC

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Important: We are moving Exalate for HP QC/ALM into basic maintenance mode. This transition period lasts until June 2024, after which support will be halted completely. For more information, please see https://exalate.com/blog/end-of-support-hp/.

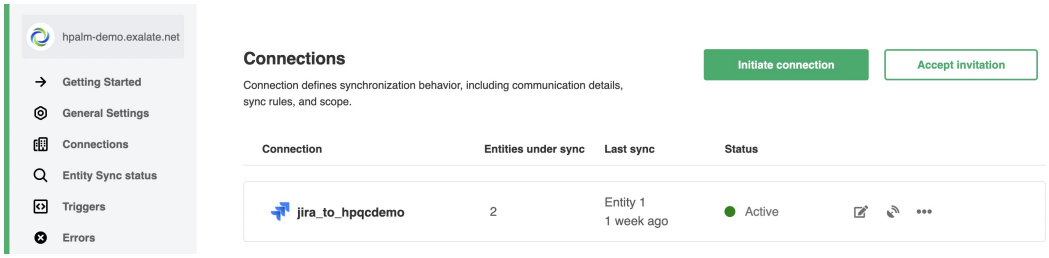
Note: Before you set up a Connection in Script mode ensure that:

- your instance is public.
- you are either in the Evaluation (trial) period or have a Paid license.

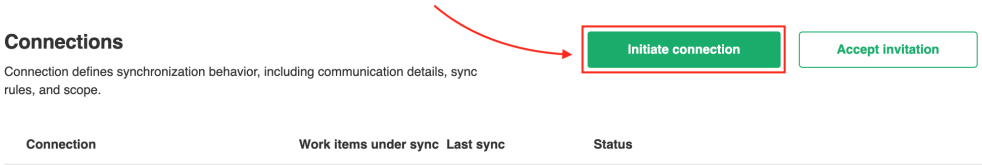
Initiate a Connection in Script Mode from HP ALM/ QC

Note: It doesn't matter which side you start initiating the Connection from. The Exalate UI remains the same. If you are initiating the connection you become the source and the other side becomes the destination.

1. Navigate to the **Connections** tab in the Exalate console.



2. Click **Initiate Connection**.



3. **Choose the type of the destination instance** .

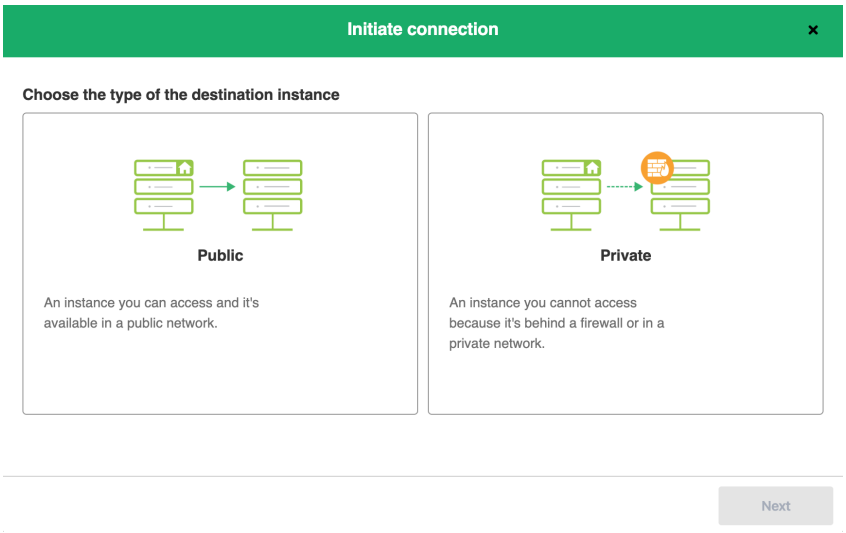
Based on the type Exalate knows how to communicate with the Destination Instance.

You can synchronize with the following types of instances:

- **Public** - the destination instance which is in a public network and you can access it from your side.
- **Private** - the destination instance in a private network or behind the firewall and you cannot access it from your side.

  The configuration depends on the connection type.

Choose Public and click **Next**.



4. Specify Connection information.

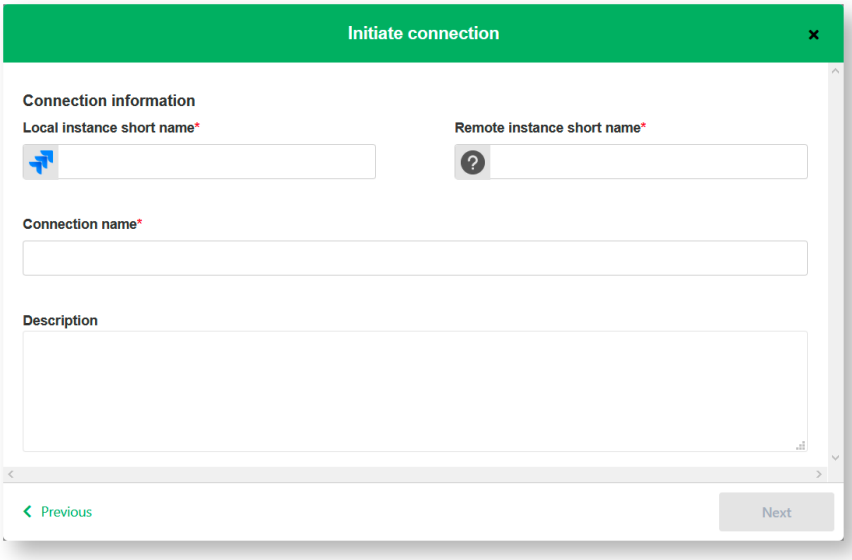
Destination instance URL - available only for public connections

Instance short names are used to name both sides of the synchronization. The connection name is based on the instances' short names.

> **Note**: The connection name is limited to 255 characters.

The Connection information describes the following:

Field	Description
Local instance short name	A short name for your instance
Destination instance short name	A short name for the destination instance
Connection name	Name of the connection
Description	Description of the connection

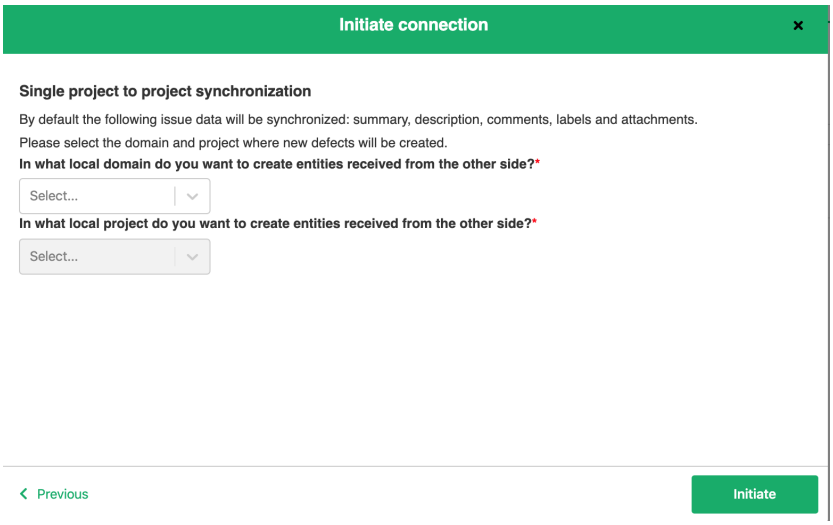


5. Click **Next**.

6. Choose the sync rules template.

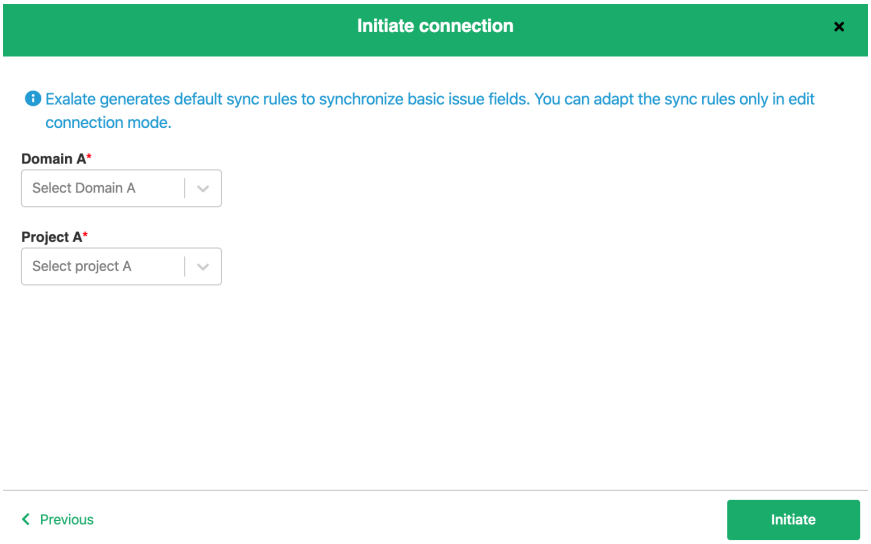
> **Note**: The connection between instances requires sync behavior configuration on both sides. Exalate generates default sync rules to synchronize basic issue fields. You can adapt the Sync Rules later.

Single Project:



Or

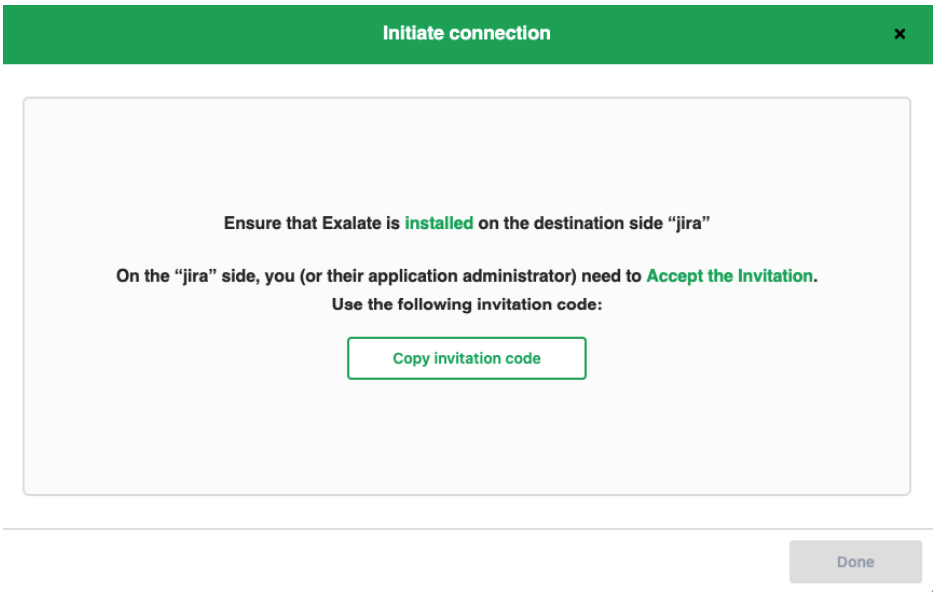
Advanced:



7. Click **Initiate**.

8. Click **Copy invitation code**.

You can send the invitation code to the destination instance admin



Note: When the other side accepts your invitation your connection is activated. Refresh the **Connections** page to see the Connection status change.

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