

Steps to Install Evolia

**This integration is installed/configured by Evolia upon customer's request.*

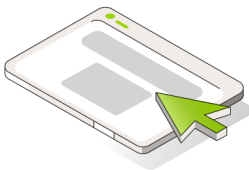
*



Prerequisite

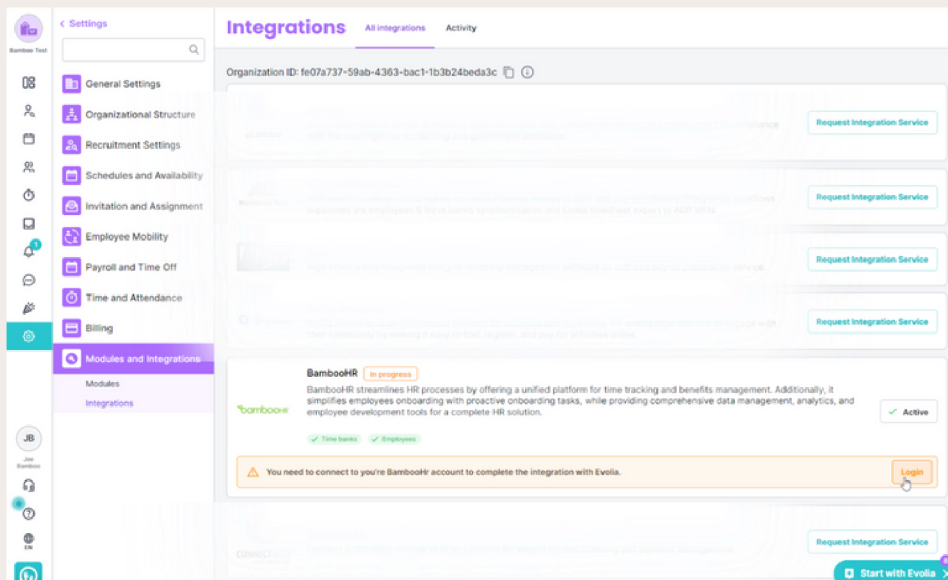
- Bamboo HR is created
- Evolia Account is created
- Evolia account is subscribed to Business plan

1



Initial Setup

From the Settings page, the administrator opens the "Integrations" page from the "Modules and Integrations" section.



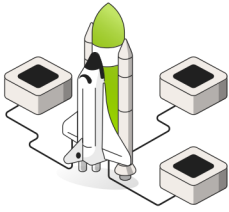
2



Request Integration Service

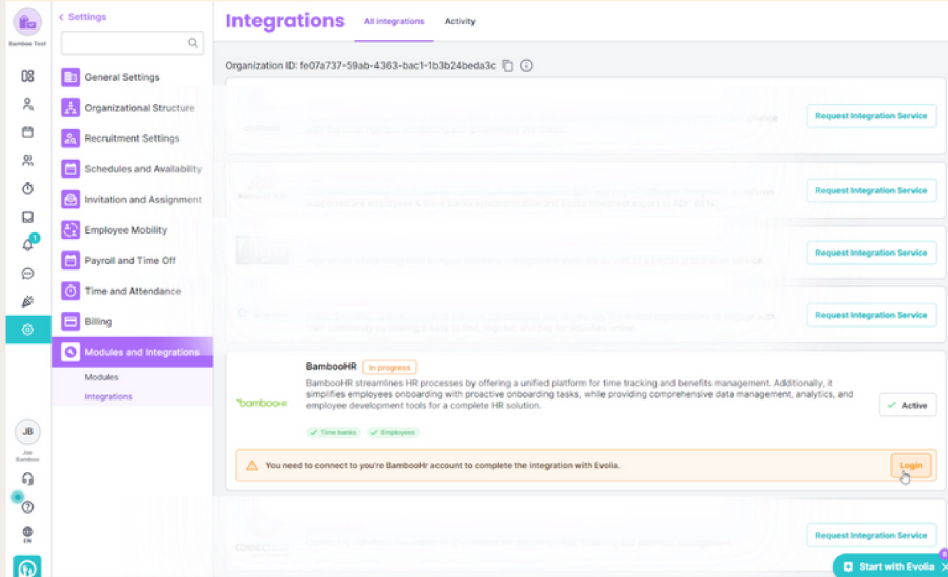
Next to Bamboo HR integration, the administrator clicks on the "Request Integration Service" button. This notifies Evolia of the integration request. Once the initial configuration is completed Evolia, will notify the requester via email.

3



Complete Account Setup

Once the configuration is complete, the login button is available. When the administrator hits the login button, Bamboo HR login page is shown. The user is invited to login in using an administrator account to complete the initial account setup.

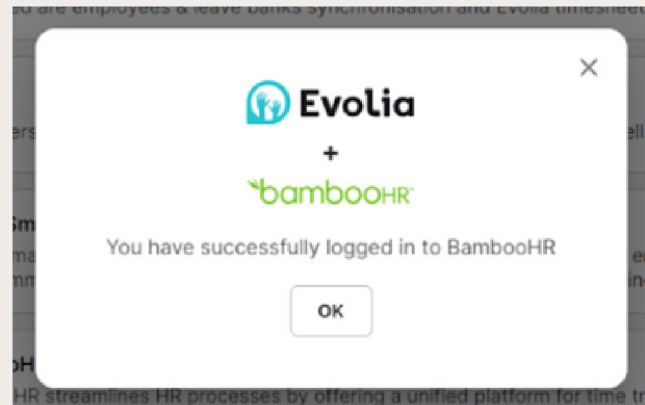
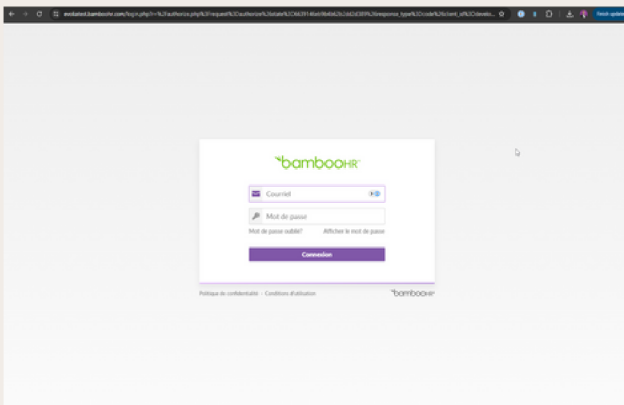


4



Login as Administrator in Bamboo

Upon login success or if user is already connected to Bamboo using an administrator account the following successful step is shown. The Integration is now in "Active" state.



Manual Employees Synch

*Employee synchronization is triggered every 4 hours automatically. However it is possible to trigger it manually by following the steps below..

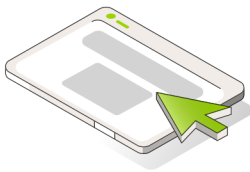
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Optional Step

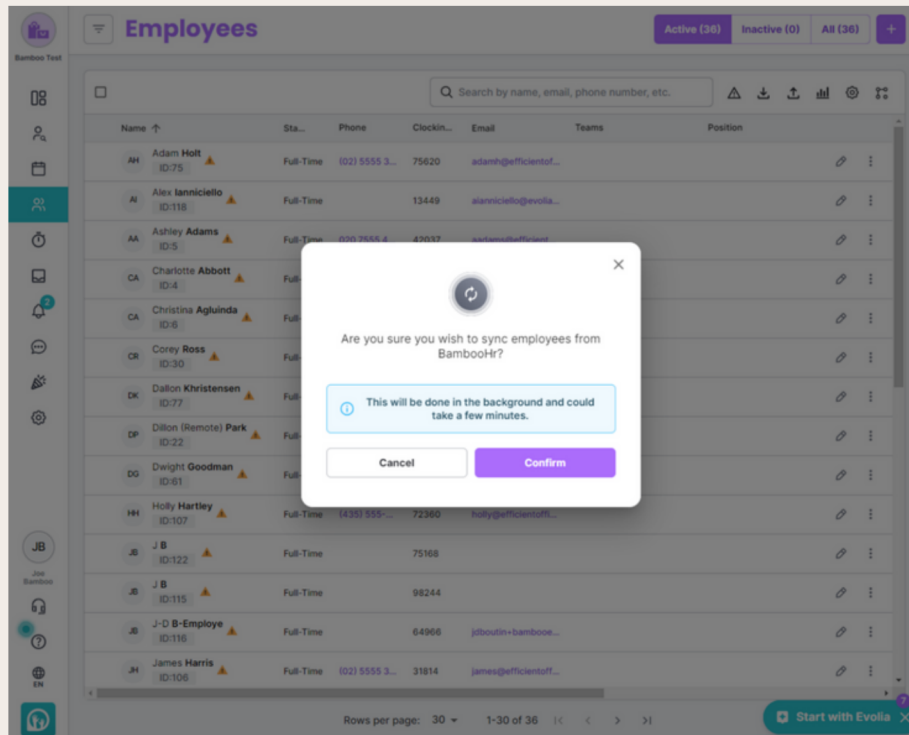
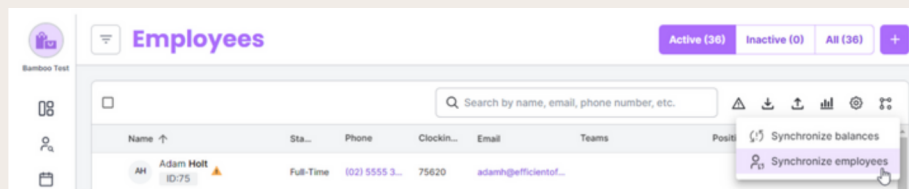
You may want to initially create the Employee positions before the initial import. From Bamboo, export a report of all the "job titles" and import the positions to Evolia using the import mechanism*. This step can also be performed after the initial import.

1



Synchronize Employees

Open to the employee view. To trigger manually an employee synchronization, select "Synchronize employees" action.

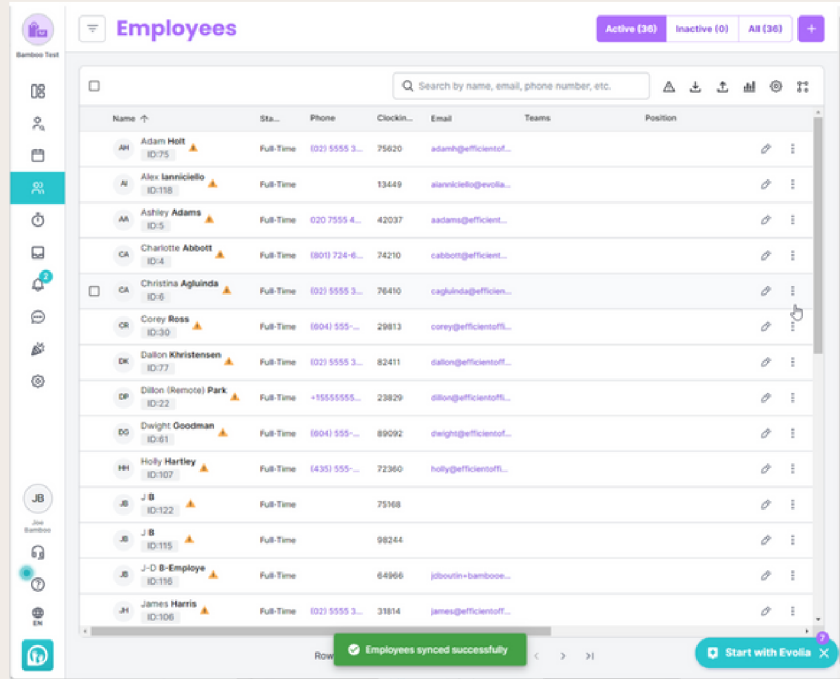


2

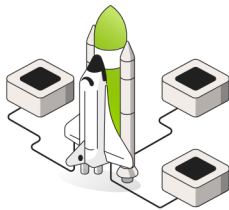


Confirmation Snackbar

The active employees are imported successfully and a confirmation snackbar is displayed.



3



See Logs

The administrator may view importation logs under : Settings -> Modules and integration -> Integrations

