

Global TA Cloud Training User Guide

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1. Introduction

Welcome to the Global TA Cloud User Guide! This comprehensive resource is designed to equip you with the knowledge and skills you need to navigate the various features and functionalities of our powerful human resource management system.

What is Global TA Cloud?

Global TA Cloud is a cloud-based HR platform that simplifies and streamlines your organization's essential HR processes. From managing employee data and payroll to automating attendance tracking and facilitating approvals, Global TA Cloud offers a centralized and user-friendly solution to enhance your HR efficiency and empower your workforce.

Who is this guide for?

This guide is intended for all users of Global TA Cloud, from HR professionals and managers. Whether you're a seasoned user looking to delve deeper into specific features or a new user just getting started, this guide will be your trusted companion on your journey towards mastering Global TA Cloud.

What you can expect to find:

- **Module-specific sections:** This guide is organized around the main modules of Global TA Cloud, providing detailed explanations of each feature's purpose, key functionalities, and step-by-step instructions for usage.
- **Visual aids:** Screenshots are incorporated throughout the guide to enhance clarity and understanding of complex processes.

Get started today!

We encourage you to explore the guide and discover how Global TA Cloud can help you optimize your HR practices and unlock new levels of efficiency for your organization.

2. Module: Employee

Feature: Master

Purpose:

This guide explains how to set up and manage master data in Global TA Cloud, including company profiles, departments, grades, designations, teams, labels, leave types, keywords, public holidays, and GPS locations.

Key Points:

- Master data forms the foundation for your employee data and processes.
- You can set up data manually or import it from an Excel file.
- Different access levels have different permissions for creating and editing master data.
- You can add holidays manually or generate them automatically based on default or government settings.

Step-by-Step Instructions:

1. Accessing Master:

- Log in to Global TA Cloud web software.
- Go to “Master” in the left menu panel.

2. Company Profile:

- To create a new company:
 - Click “Add New” .
 - Provide company details like “name”, “email”, “phone”, “fax”, “address”, “website”, “SSB Register No.”, “leave period”, “budget period”, and payment settings.
 - Check on or off for “Use this Company as Default”.
 - Generate employee numbers (optional).
 - Click “Save”.
- To edit or delete a company:
 - Locate the company in the list.
 - Click the “Edit” or “Delete icon” .
 - Make changes or confirm deletion.

3. Department:

- To create a department:

- Click "Add New" .
- Enter department details like "short code", "name", "order", "company", "parent department", "shift".
- Check on or off for "Use this department as Default".
- Click "Save".

- You can also import departments from an Excel file.

4. Grade:

- To create a grade:

- Click "Add New" .
- Enter grade details like "name", "order", "upper grade".
- Choose "Default", "Topmost (optional)".
- Click "Save".

- You can also export a list of grades to Excel.

5. Designation:

- To create a designation:

- Click "Add New" .
- Enter designation details like "short code", "name", "order", "grade".
- Choose "Use this Designation as default" (optional).
- Click "Save".

- You can also import designations from an Excel file or watch a video tutorial.

6. Team Setup:

- To create a team:

- Click "Add New" .
- Enter team details like name, description, product, and type (Team or Project).
- Choose "Inactive" if not currently used.
- Click "Save".

- You can also export a list of teams to Excel.

7. Label Setup:

- To create a label:

- Click "Add New" .

- Enter label details like name, description, type (Claim, Leave, OT, etc.)
- Choose “Inactive” if not currently used.
- Click Save.

8. Leave Type:

- To create a leave type:

- Click “Add New”  .
- Enter leave type details like “short code”, “name”, “Gender Option”(Maternity Leave for Female, Paternity Leave for Male), “Use reason mandatory”, “file attachment option”, and “import-only” option.
- Choose “Inactive” if not currently used.
- Click Save.

9. Keyword:

- This category includes various options like Division, Location, Section, Group, and Cost Center.
- Each option has its own setup process similar to creating departments, with details specific to each category (location name, group name, etc.).

- Click “Add New”  .
- Write “Name”
- Choose “Default”(option)
- Choose “Inactive” if not currently used
- Click “Save”.

10. Public Holiday:

- To create a Public Holiday:

a. Manually Adding a Public Holiday:

- Click the “Add New”  .
- Choose “Date” or “Date Range”.
- Enter the Date (for a single-day holiday) or set the Start Date and End Date (for a date range).
- Provide a “Description” (name of the holiday).
- Optionally, select Use this holiday as default for holidays with fixed dates.
- Click “Save”.

b. Generating Public Holidays:

- From Default Option:
 - Click the “Generate icon”.
 - Enter the Generate Year or use the calendar to select it.

- Click “Generate”.
 - From Government Holiday:
 - Click the “Government Holiday icon”.
 - Click “Generate” to set dates and descriptions based on government settings.
 - c. Viewing Old Public Holiday Records:
 - Use the Calendar choose box to select the desired year.
11. GPS Location:
- To create a GPS location:

- Click “Add New”  .
- Choose location method (By Map or By Location).
- If using “By Map”, search for and select the “location”, set the “radius”.
- If using “By Location”,
 - Choose “Division” method (Use Division or Not Use Division)
 - If not using “Division”, search for and select “country”, “division”, “district”, and “township”.
 - If using “Division”, search for and select “country”, “division”.
 - Click “Save”.
- You can also import GPS locations from an Excel file.

Additional Information:

- Experiment with different setup options to find the most efficient configuration for your organization.
- Regularly review and update your Master data to ensure accuracy and alignment with your current needs.

Screenshots:

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Kaung Myat Thu Staff

Dashboard

Master

Company Profile

Department

Grade

Designation

Team Setup

Label Setup

Job Code Setup

Leave Type

Shift Policy

Keyword

Public Holiday

Salary Scale Setup

Group Policy

Company Profile / Master / Company Profile

Company Name	Action
Company A	+ - E
Company B	+ - E
Factory A	+ - E
Kaung Myat Thu	+ - E

Page 1 of 1 10 items per page 1 - 4 of 4 items

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Kaung Myat Thu Staff

Dashboard

Master

Company Profile

Department

Grade

Designation

Team Setup

Label Setup

Job Code Setup

Leave Type

Shift Policy

Keyword

Public Holiday

Salary Scale Setup

Group Policy

Cluster: Select Cluster ...

Address

City State

Country Zip Code

WebSite (http://www.sample.com)

SSB Register No.

Internal LeavePolicy Attach File (pdf)

SELECT FILE... Drop files here to upload

Leave Start Leave Start Day Budget Start

Jan 1 Jan

Use this Company as default

Payment Duration

Month End Pay

Service Month

Date of Employee Permanent Date

Payslip Design

Office Holiday

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Use Generate Number

Use Generate EnrollNumber

Use Generate EmployeeCode

Use Same EnrollNumber and EmployeeCode

Cancel Save

Department / Master / Department

Include Inactive Inactive Only

Department Order	Short Code	Department Name	Parent Department Name	Company Name	Status	Action
1	DD	Admin		Kaung Myat Thu	Active Default	
	B1	Branch 1		Kaung Myat Thu	Active	
0	dC	Dept C		Company B	Active	
1	dD	Dept D		Company B	Active	
2	dE	Dept E		Company B	Active	
53	dF	Dept F		Company B	Active	
100	DA	Department A		Company A	Active	
1000	DA	Department A		Factory A	Active	
1001	Item(1)	Sub Department 1	Department A	Company A	Active	
1002	Dept B	Dept B		Company B	Active	

Page 1 of 1 10 items per page 1 - 10 of 10 items

Add Department / Master / Department

Short Code Department Order
1003

Department Name *

Company
Kaung Myat Thu

Parent Department
Select Parent Department...

Select Shift
Default Shift x Main Shift x Night Shift x

Use this Department as default
 Inactive

Cancel Save

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Kaung Myat Thu Staff

Dashboard

- Master
- Company Profile
- Department
- Grade
- Designation**
- Team Setup
- Label Setup
- Job Code Setup
- Leave Type
- Shift Policy
- Keyword
- Public Holiday
- Salary Scale Setup
- Group Policy

Designation / Master / Designation

Include Inactive Inactive Only

Designation Order	Short Code	Designation	Status	Action
1	st	Staff	Active Default	✎ ✖
2	1	Director	Active	✎ ✖
3	CEO	CEO	Active	✎ ✖
4	4	Marketing Specialist	Active	✎ ✖
5	5	Supervisor	Active	✎ ✖
6	6	Manager	Active	✎ ✖
7	MD	Managing Director	Active	✎ ✖
100	SE	Software Engineer	Active	✎ ✖
200	FED	Front-End Developer	Active	✎ ✖
300	BED	Back-End Developer	Active	✎ ✖

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Kaung Myat Thu Staff

Dashboard

- Master
- Company Profile
- Department
- Grade
- Designation
- Team Setup**
- Label Setup
- Job Code Setup
- Leave Type
- Shift Policy
- Keyword
- Public Holiday
- Salary Scale Setup
- Group Policy

Team / Master / Team Setup

Include Inactive Inactive Only

Team Name	Description	Team Type	Status	Action
Development Team A	Development Team A	Team	Active	✎ ✖
Group A	GA	Team	Active	✎ ✖
Group B	Group B	Team	Active	✎ ✖
Service Team(A)	Service Team(A)	Team	Active	✎ ✖

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Label Master / Label Setup

Kaung Myat Thu Staff

Dashboard

Master

- Company Profile
- Department
- Grade
- Designation
- Team Setup
- Label Setup**
- Job Code Setup
- Leave Type
- Shift Policy
- Keyword
- Public Holiday
- Salary Scale Setup
- Group Policy

Label Name	Description	Label Type	Status	Action
Internet Issue	Internet Issue	Attendance	Active	✎ ✖
Claim Test 2	Claim test 2	Claim	Active	✎ ✖
ခရီးစဉ်အတွက် ငြင်းပယ်ခံရသည့် Claim ဖြင့်	ခရီးစဉ်အတွက် ငြင်းပယ်ခံရသည့် Claim ဖြင့်	Claim	Active	✎ ✖
Evening OT	Evening OT	OT	Active	✎ ✖
Travel Request	Travel Request	Claim	Active	✎ ✖

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Leave Type Master / Leave Type

Kaung Myat Thu Staff

Dashboard

Master

- Company Profile
- Department
- Grade
- Designation
- Team Setup
- Label Setup
- Job Code Setup
- Leave Type**
- Shift Policy
- Keyword
- Public Holiday
- Salary Scale Setup
- Group Policy

Name	Short Code	Status	Action
Annual Leave	AL	Active	✎ ✖
Casual Leave	CL	Active	✎ ✖
Maternity Leave	MTL	Active	✎ ✖
Paternity Leave	PaL	Active	✎ ✖
WithoutPayLeave	wp	Inactive	✎ ✖

Page 1 of 1 10 items per page 1 - 5 of 5 items

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Division / Master / Keyword

Dashboard

Master

- Company Profile
- Department
- Grade
- Designation
- Team Setup
- Label Setup
- Job Code Setup
- Leave Type
- Shift Policy
- Keyword**
- Public Holiday
- Salary Scale Setup
- Group Policy

DIVISION LOCATION SECTION GROUP COST CENTER

Include Inactive Inactive Only

Division	status	Action
AYA	Active	
MDY	Active	

Page 1 of 1 10 items per page 1 - 2 of 2 items

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Division / Master / Keyword

Dashboard

Master

- Company Profile
- Department
- Grade
- Designation
- Team Setup
- Label Setup
- Job Code Setup
- Leave Type
- Shift Policy
- Keyword**
- Public Holiday
- Salary Scale Setup
- Group Policy

DIVISION LOCATION SECTION GROUP COST CENTER

Include Inactive Inactive Only

Division	status	Action
AYA	Active	
MDY	Active	

Page 1 of 1 10 items per page 1 - 2 of 2 items

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Kaung Myat Thu Staff

Public Holidays Master / Public Holidays

Date	Description	Status	Action
2024-12-25	Christmas	Active	Default

Page 1 of 1 10 items per page 1 - 1 of 1 items

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Kaung Myat Thu Staff

Public Holidays Master / Public Holidays

Generate Public Holiday

Generate Year

2024 2025

Cancel Save

Date	Description	Status	Action
2024-12-25	Christmas	Active	Default

Page 1 of 1 10 items per page 1 - 1 of 1 items

GlobalTA&HR HELP : 09 9400 505 00

Public Holidays / Master / Public Holidays

Kaung Myat Thu

- Dashboard
- Master
- Company Profile
- Department
- Grade
- Designation
- Team Setup
- Label Setup
- Job Code Setup
- Leave Type
- Shift Policy
- Keyword
- Public Holiday**
- Salary Scale Setup
- Group Policy

Government Holiday Generate

Date: 2023

Date	Description
01/02/2023	ကဆုန် နှစ်သစ်လကူး
03/13/2023	ကဆုန် နှစ်သစ်လကူး
04/11/2023	ဗုဒ္ဓ နှစ်သစ်လကူး
04/30/2023	ဗုဒ္ဓ နှစ်သစ်လကူး
05/18/2023	မေလ နှစ်သစ်လကူး
06/17/2023	ရခိုင် နှစ်သစ်လကူး
07/16/2023	ရှမ်း နှစ်သစ်လကူး
09/20/2023	ယခါပိုင် နှစ်သစ်လကူး
10/01/2023	ကဆုန် နှစ်သစ်လကူး
10/05/2023	မေတ္တာ နှစ်သစ်လကူး

1 - 10 of 11 items

Cancel Generate

Date	Description	Status	Action
2024-12-25	Christmas	Active	Default

Page 1 of 1 10 items per page 1 - 1 of 1 items

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GPS Location / Master / GPS Location

- Grade
- Designation
- Team Setup
- Label Setup
- Job Code Setup
- Leave Type
- Shift Policy
- Keyword
- Public Holiday
- Salary Scale Setup
- Group Policy
- Attendance Rule
- GPS Location**
- Payment Title
- Payment Rule
- Custom Variables

Include Inactive Inactive Only

Location Order	Location Name	Radius (meter)	Latitude,Longitude	Township	Department Name	Status	Action
60	New Office	0	0 - 0	Thingangyun (သံပဲခင်္ဂယုန်)		Active	✉ ✖
70	New Office 2	0	0 - 0	Mandalay (မန္တလေးတိုင်းဒေသကြီး)		Active	✉ ✖
80	New Office by Excel Import	100	21 - 21			Active	✉ ✖
10	Office	50	16.7923726 - 96.1443386			Active	✉ ✖

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Add GPS Location / Master / GPS Location

Location Order: 100 Location Name *

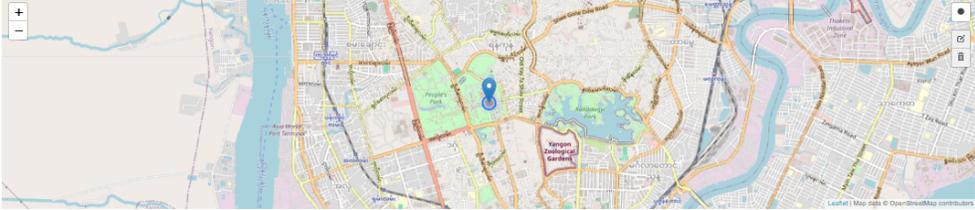
Select Department: Admin | Branch 1

By Map By Location

Radius(meter): 100 Search for Location

Latitude/Longitude: 16.798336,1496 Inactive

Locations



Cancel Save

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Add GPS Location / Master / GPS Location

Location Order: 100 Location Name *

Select Department: Admin | Branch 1

By Map By Location

Country *

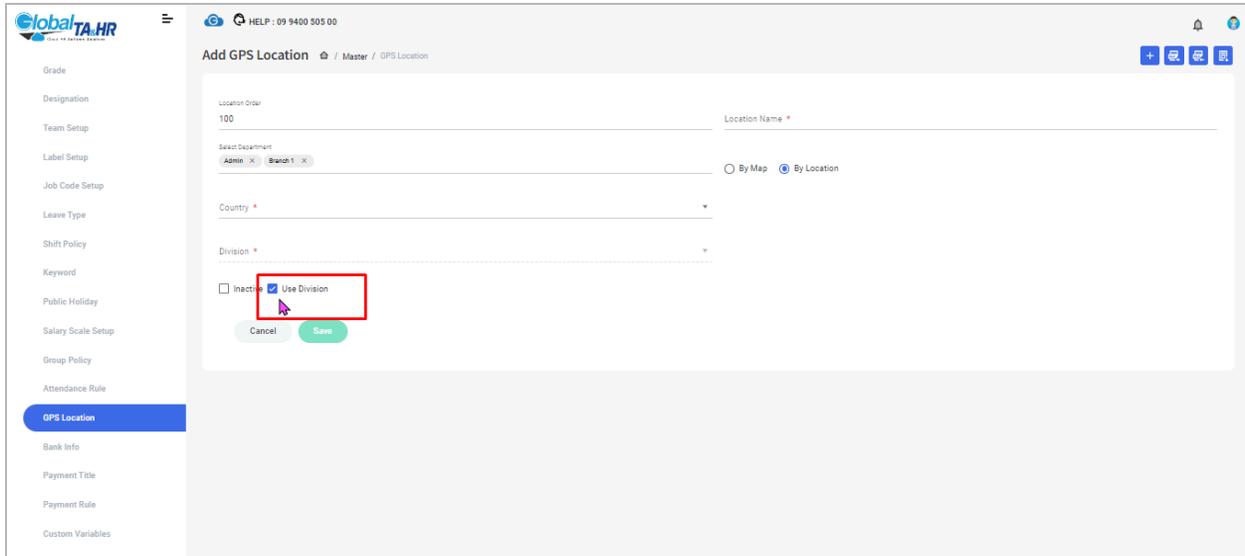
Division *

District *

Township *

Inactive Use Division

Cancel Save



Feature: User Level Management

Purpose:

- Define and control user access to system features and employee data based on roles and responsibilities.

Key Features:

- Forms:
 - User Level Management
 - User Level Control
 - User Employee Access
- Access Permission Enhancements:
 - Menu List: Grant access to specific menus for each user level.
 - User Level Permission: Control which user levels can be seen and managed by other user levels.
- Employee List Access:
 - Permission Type options: By Employee, By Department, By Company.
 - Automatic employee attachment for By Department and By Company.
- User Level Creation:

- HR User Levels require +Add User Level Control for Employee List access.
- Administrator Levels have direct access to Permission Types.

How to Create a New User Level:

1. User Level Control:
 - Create a new user level with “name” and “description”.
 - “Assign permissions” (Login, Menu List).
 - “Save”.
2. Access Permissions:
 - Grant “menu” access (Mobile, Web, Request, Approve).
 - “Add user level control” for HR User Level (if applicable).
 - “Update”.
3. User Employee Access:
 - Select “Permission Type” (By Employee, By Department, By Company).
 - Choose “employees” or “departments”/”companies”.
 - “Update”.

Special Tips:

- Use User Employee Access to control employee visibility in forms.
- Administrator Level must assign Employee List permission for all HR levels.

Common Questions:

- Q: Will new employees be attached to Approver Groups?
- A: Yes, for relevant Attendance Requests.
- Q: Will Approvers see new employees in other forms?
- A: Not unless attached in User Employee Access.
- Q: Does Administrator Level assign Employee List permission to all HR levels?
- A: Yes, for all HR levels to have access.

Screenshots:

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User Level Control / User Level Management / User Level Control

Kaung Myat Thu
Staff

- Dashboard
- Master
- Employee
- Time Attendance
- Human Resource
- Payroll Management
- User Level Management**
 - User Level Control**
 - User Employee Access
- System
- Report
- Claim
- Daily Tasks

Search	
Administrator	🔒
Staff	🔒
CompanyAstaff	🔒
All Company HR	🔒
Company A Supervisor	🔒
Company A HR	🔒
BU 1 HR	🔒
Management A	🔒
CompanyBstaff	🔒
Company B HR	🔒
Company B Supervisor	🔒

Enter Current Admin Password
Password is required

User Level Setup

User Level * _____ Description * _____

Restricted IP List

Remark

Menu List
 Employee List
 Allow Web Login
 Allow Mobile Login
 AccessNewEmployee
 inactive
 Access Profile Change Noti

Cancel Save

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User Level Control / User Level Management / User Level Control

Kaung Myat Thu
Staff

- Dashboard
- Master
- Employee
- Time Attendance
- Human Resource
- Payroll Management
- User Level Management**
 - User Level Control**
 - User Employee Access
- System
- Report
- Claim
- Daily Tasks

Search	
Administrator	🔒
Staff	Access Permission 🔒
CompanyAstaff	🔒
All Company HR	🔒
Company A Supervisor	🔒
Company A HR	🔒
BU 1 HR	🔒
Management A	🔒
CompanyBstaff	🔒
Company B HR	🔒
Company B Supervisor	🔒

Enter Current Admin Password
Password is required

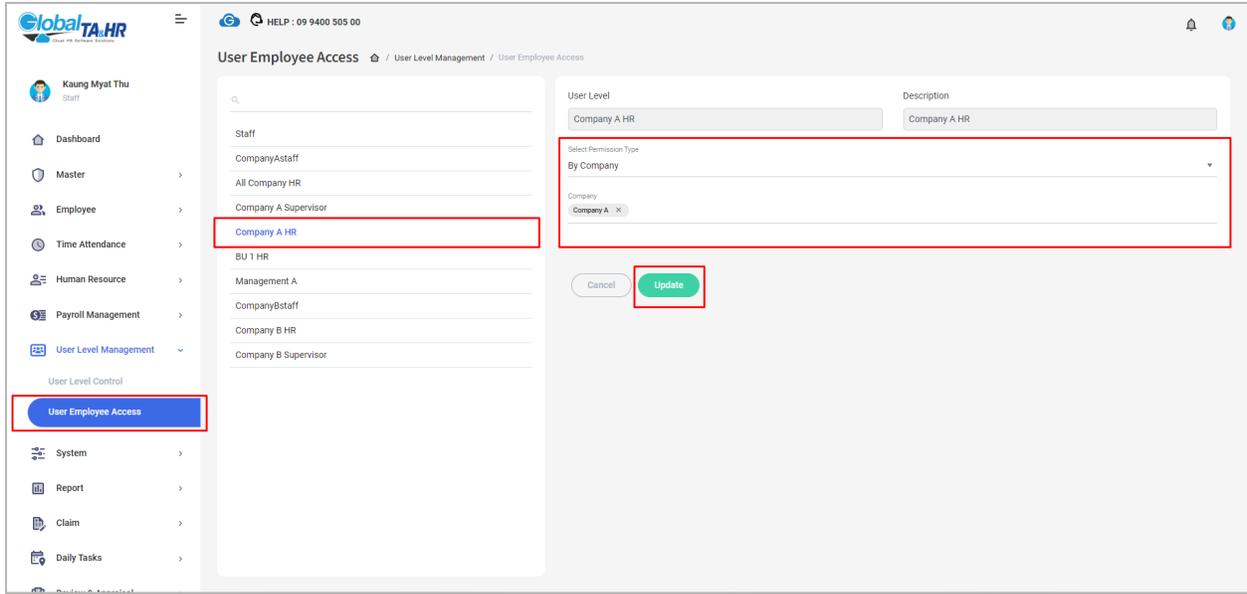
Access Permission

Menu List

- Custom Variables
- Employee
- Time Attendance
- Human Resource
- Payroll Management
- User Level Management
- System
- Report
- Duty Swap
- Claim
- Daily Tasks
- Review & Appraisal

User Level Permission
+ Add User Level Control
Search...

Update



Feature: Approver

Purpose:

- To designate individuals within the organization who are responsible for reviewing and approving employee requests, such as attendance requests, leave requests, and overtime requests.
- To streamline the request approval process and ensure compliance with company policies.

Key Points:

- Two assignment settings: Normal Level (direct assignment) and Multi-Level (approval groups)
- Final Approver designation for ultimate approval authority
- Delegated Transactions for temporary approval assignments
- Employee Group Transactions for managing approver changes within groups
- Filter and Export options for data management
- Import functionality to assign approvers from Excel

Sections:

1. Setting Up Approvers:

- Normal Level:
 - Navigate to “System” > “Approver Setting” > “Normal Level for Approver Assign”.
 - Select desired options (e.g., final approval, edit permission).
 - Choose employees and assign their approvers.
 - Click “Publish”.
- Multi Level:
 - Navigate to “System” > “Approver Setting” > “Multi Level for Approver Assign”.
 - Select desired options (e.g., update permission, skip for the same approver).
 - Create Approver “Groups” with names and policies.
 - Add approvers to each group level.
 - Assign employees to relevant Approver Groups.

Section: Normal Level Approver

Purpose:

- Directly assign approvers to individual employees for efficient approval processes.
- Grant approvers final approval authority or the ability to edit requests as needed.

Key Points:

- Direct assignment of approvers to employees
- Options for final approval and request editing
- Skipping approval when the requester is also the approver
- Designation of final approvers

How to Use Normal Level Approver:

1. Setting Up Normal Level Approvers:

1. Navigate to “System” > “Approver Setting” > “Normal Level for Approver Assign”.
2. Select desired options:
 - Approver is finally approved Attendance/Overtime Request
 - Approver is finally approved Leave Request
 - Approver has permission to edit Attendance/Overtime Requests

- Approver has permission to edit Leave Request
 - Skip Approve If Requester is Same with Approver
3. Click Check on any options that you want.

2. Assigning Approvers to Employees:

1. Go to “System” > “Approver Assign”.
2. Choose employees using “Organization structure” or “Filter by Employee”.
3. Click Search.
4. Click “Edit” under the “Action” Column.
5. Select the Approver(s) for the employee.
6. Click “Publish”.

3. Creating Final Approvers (Optional):

1. In “Approver Assign” Page, click “the Final Approver icon”.
2. Click “+ Add Final Approver”.
3. Select “Approver Name”.
4. Check on “Attendance”/”Leave”/”OT”/”DutySwap”/”Claim” as needed.
5. Click “Select”.
6. Click “OK” for Save Successful Box.

Additional Notes:

- Ensure User Levels are set appropriately for approvers to access necessary menus and functions.
- Refer to User Level Control documentation for guidance:
<https://www.globalta.com.mm/support/userlevelcontrol/>

Section: Multi-Level Approver

Purpose:

- Establish a chain of approvers with varying levels of responsibility for structured approval processes.
- Create Approver Groups for efficient assignment of approvers to employees.

Key Points:

- Approver Groups with multiple levels and policies
- Final Approver designation
- Delegated Transactions for temporary approval assignments
- Employee Group Transactions for managing approver changes within groups
- Filtering and exporting options for data management
- Import functionality for assigning Approver Groups from Excel

How to Use Multi-Level Approver:

1. Setting Up Multi-Level Approvers:

1. Navigate to “System” > “Approver Setting” > “Multi Level for Approver Assign”.
2. Select desired options:
 - Allow Approver Assign Update
 - Skip Approve If Requester is Same with Approver
 - Approver has permission to edit Attendance/Overtime Requests
3. Click Check on the any options that you want.

2. Creating Approver Groups:

1. Go to “System” > “Approver Assign”.
2. Click “Group” Setup.
3. Click “+ Add Group” and provide a Group Name.
4. Click “+ Add Policy” and provide a Policy Name.
5. Click “Add Approver” to add approvers for each level.
6. Click “+ Add New Level” to create additional levels as needed.
7. Click “Save”.

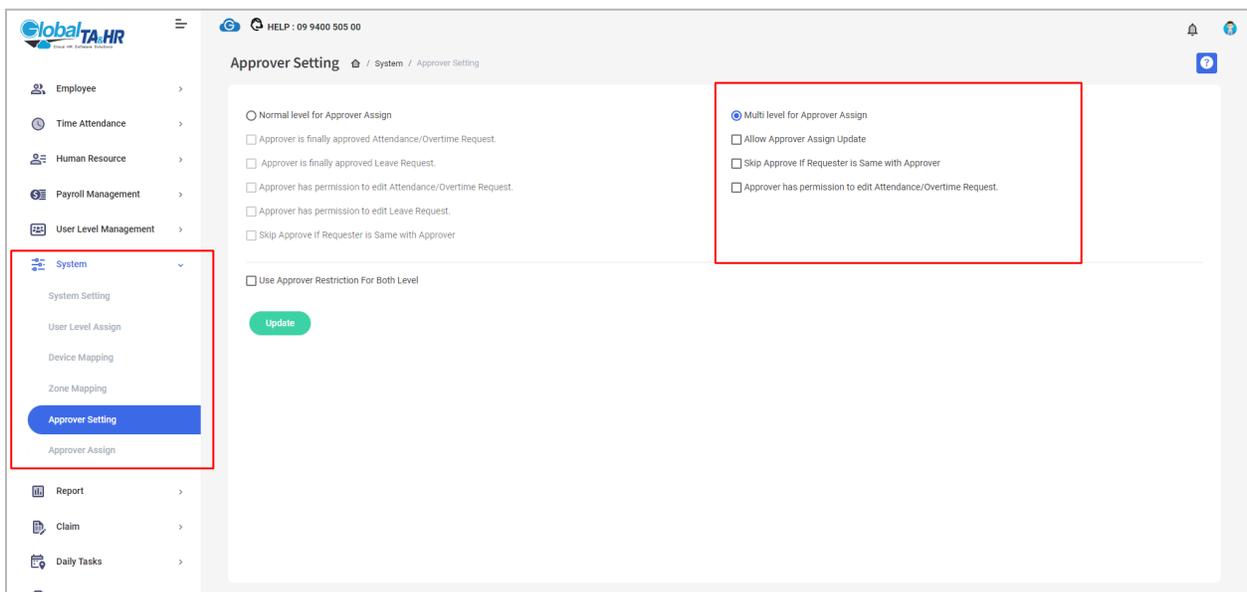
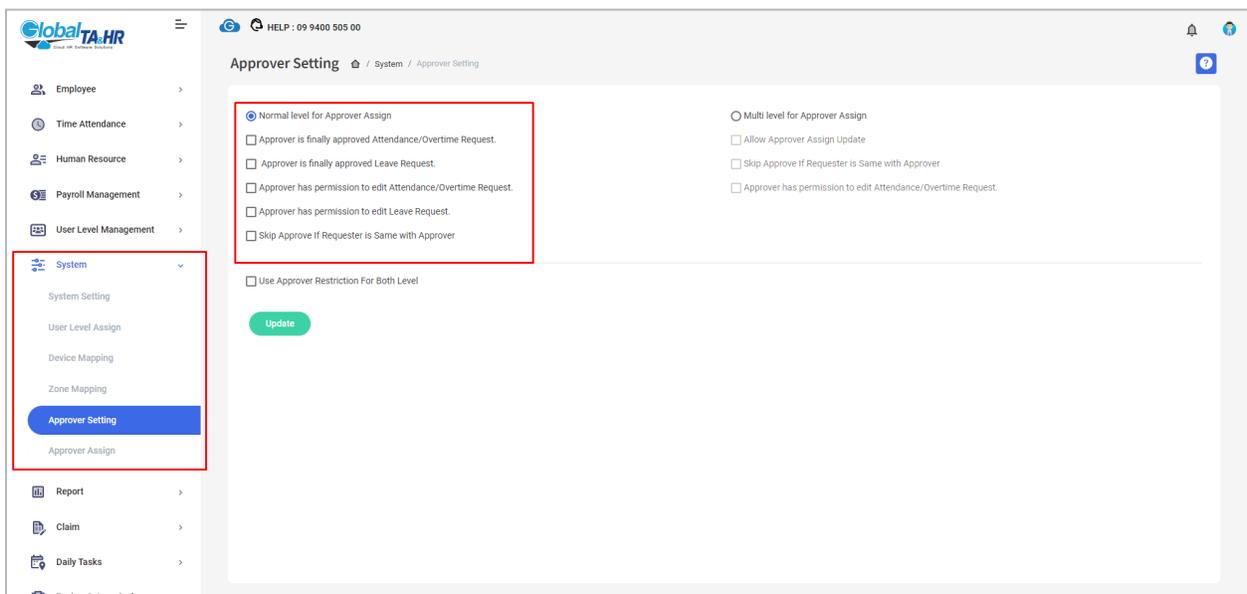
3. Assigning Approver Groups to Employees:

1. Use “Organization Tree”, “Filter by Employee”, or “Filter by Group” to locate employees.
2. Click “Edit” under the Action Column.
3. Select the Approver Group for the employee.
4. Click “Publish”.

4. Additional Information:

- Final Approver: Specify a final approver for each Approver Group.
- Delegated Transactions: Manage temporary approval assignments.
- Employee Group Transactions: Manage approver changes within groups.
- Filter & Export: Use options to find specific approvers, groups, and export data to Excel.
- Import: Use “Download Template”  and Import icons to assign Approver Groups from Excel.

Screenshots:



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Approvers Assign / System / Approver Assign

Search Reset Default Publish

Employee Name	Approver List	Action
Hein Thu Aung		
ALING MYO HEIN		
ALING PYAE PHYO		
Myo Kyaw Thu Hein		
Myint Myat Hla		
KYAW ZAYAR TOE		
Myint Naing Minn		
Thura Khin Kyaw		
Thura Hlike Toe		
Aung Aung		
Aung Paing		
Wai Hnin Yee(Daw)		
NAW SAY WAH SHEE		

15 items per page 1 - 15 of 40 items

Approvers Assign

GlobalTA&HR HELP : 09 9400 505 00

Approvers Assign Level / System / Approver Assign Level

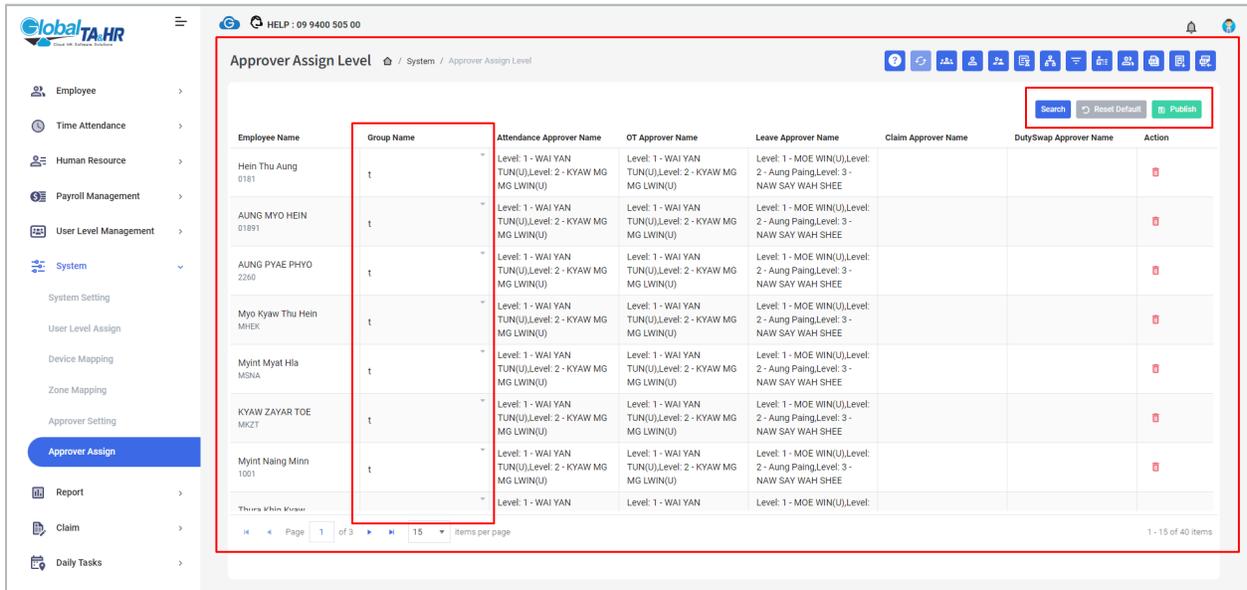
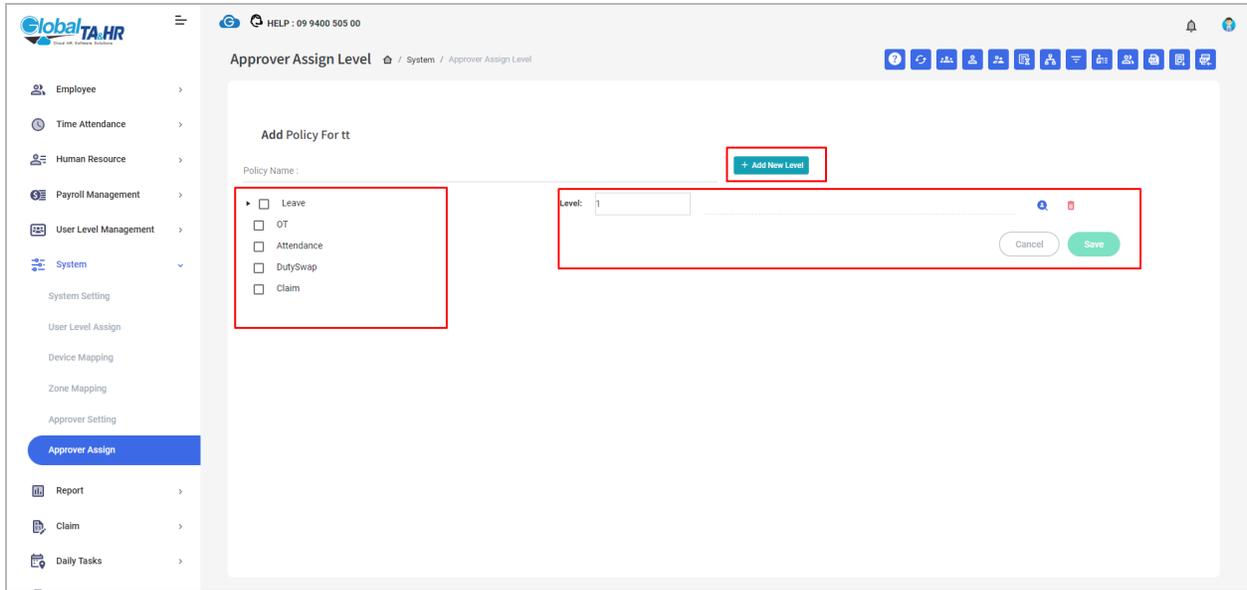
Group Name: Employee Not Use Group Preview Add Group

EXPORT TO EXCEL

Group Name	Action
+ abcd approver 1	<input checked="" type="checkbox"/> <input type="checkbox"/>
+ 2LvLApprover	<input checked="" type="checkbox"/> <input type="checkbox"/>
+ NTA_Approver	<input checked="" type="checkbox"/> <input type="checkbox"/>
+ PoEDarli	<input checked="" type="checkbox"/> <input type="checkbox"/>
+ testkmt	<input checked="" type="checkbox"/> <input type="checkbox"/>
+ Supervisor B	<input checked="" type="checkbox"/> <input type="checkbox"/>
+ ApproverGroup 20221122141620_10010	<input checked="" type="checkbox"/> <input type="checkbox"/>

Page 1 of 3 15 items per page 1 - 15 of 41 items

Approvers Assign



Feature: Profile Approve

Purpose:

- This guide explains how to review and approve or reject employee profile changes requested through the Mobile App, ensuring the accuracy and consistency of employee information in the system.

Key Points:

- Profile Approve enables authorized users to manage employee-initiated profile changes.
- Changes can include phone numbers, addresses, and other relevant information.
- Users can filter profiles by status, employee, and organizational structure for efficient review.
- Approved changes are incorporated into the system, while rejected changes are not.

Step-by-Step Instructions:

1. Accessing Profile Approve:
 - Log in to Global TA Cloud web software.
 - Go to “Time Attendance” in the left menu panel.
 - Click “Profile Approve”.
2. Filtering Profiles:
 - Select the desired Period for review.
 - Choose the “Status” of profiles you want to see (pending, approved, rejected, or All).
 - Optionally, “filter by Employee” or “Organizational Structure” for a more focused view.
3. Previewing Profiles:
 - Click “Preview” to view profiles based on your selected criteria.
4. Managing Profile Changes:
 - For each profile:
 - Click Approve to accept the changes and incorporate them into the system.
 - Click Reject to deny the changes and maintain the existing data.
 - Click View Details to examine the specific changes requested, with new data highlighted in green text.

Additional Information:

- Regularly review pending profile changes to ensure timely processing.
- Use filters effectively to manage large numbers of profiles efficiently.
- Carefully review change details before approving or rejecting to maintain data accuracy.

Screenshots:

GlobalTA&HR HELP : 09 9400 505 00

Profile Approve / Time Attendance / Profile Approve

INTERNAL EXTERNAL

Period: All Status: Pending

Preview

Action	Enroll Num...	Name	D.O.B	NRC	Email	Phone
No records						

Page 0 of 0 10 items per page 0 - 0 of 0 items

GlobalTA&HR HELP : 09 9400 505 00

Profile Approve / Time Attendance / Profile Approve

INTERNAL EXTERNAL

Period: All Status: All

Preview

Action	Enroll Num...	Name	D.O.B	NRC	Email	Phone
⋮	30002	Supervisor A	10-10-1990			
⋮	30003	Staff A1	10-10-1990	12/pathana(n)222222		

Page 1 of 1 10 items per page 1 - 2 of 2 items

Feature: Employee Setup

Purpose:

- Create and maintain accurate employee profiles within the system.
- Define essential personal, work-related, and access information.
- Ensure accurate workforce data for attendance, payroll, and other HR functions.

Key Points:

- Multiple Tab Menus: Organize employee information into categories for easy access and management.
- Flexible Data Entry: Add new employees manually or import multiple profiles using Excel templates.
- Comprehensive Information Coverage: Capture a wide range of employee details, including:
 - Personal information
 - Login credentials
 - User levels
 - Organizational structure
 - Attendance settings
 - Team
 - Approvers
 - Social security and tax registration numbers
 - Marital status and education
 - Bank information
 - Custom fields
 - Fingerprint scanner selection (if applicable)
 - Work location mapping (if applicable)
 - Household dependents (if applicable)
 - Check-in/out methods and photo capture settings

Essential Steps:

1. Complete Organizational Master Setup: Ensure company structure is in place before adding employees.
2. Add New Employees:
 - Manual Entry: Click "Add New"  button and enter the required information.
 - Excel Import:
 1. Download the template by clicking the "Download Template" icon .
 2. Fill in the template with employee details.
 3. Import data:
 - Click the "Import" icon.
 - Select the file.

- Click "Validate Data" and then "Import Data."

3. Complete Additional Setup (if applicable):

- Attendance settings
- Team assignments
- Approver assignments
- Fingerprint information
- Zone mapping
- Dependent information
- Check-in/out methods and photo capture settings

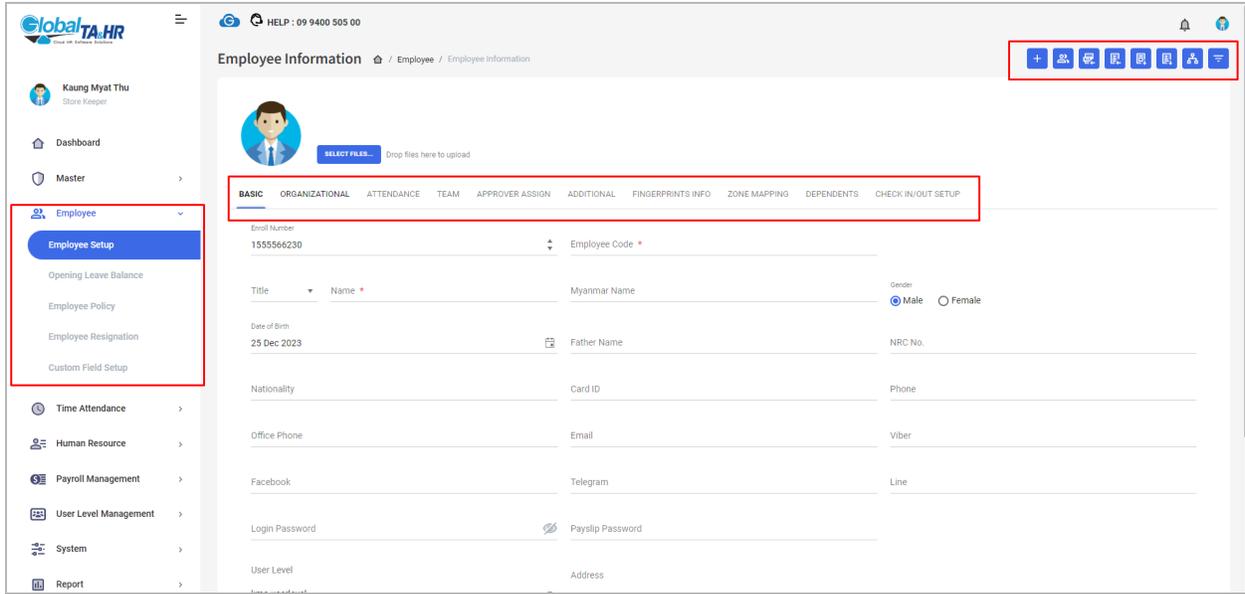
Key Points:

- Mandatory Fields: Enroll Number, Employee Code, Name, Login Password, User Level, Date of Birth, Date of Employment
- Default User Level: Administrator
- Excel Format: General format (not formula-based)
- Error Handling: Excel import prevents import and displays error codes if errors are found.

Additional Information:

- Employee Information Form: Contains basic information for attendance functionality.
- Select Files: Limited to profile photos and QR codes (during COVID).
- Organization Tree: View employees by department structure.
- Filter by Employee: Search for employees using various criteria.

Screenshots:



Feature: Employee Resignation

Purpose:

- Process employee departures within the system.
- Record final working dates, resignation reasons, and statuses.
- Maintain accurate workforce data and ensure proper offboarding procedures.

Key Points:

- Record Resignation:
 - Specify last working date.
 - Select resignation status (create new statuses if needed).
 - Add optional comments for context.
- Cancel Resignation:
 - Reverse resignation for employees who mistakenly resigned or are rejoining.
- View Resigned Employees:
 - Filter to include all resigned employees, inactive employees, or those who resigned within a specific period.
 - Resigned employees are visually marked in red text.

Resigning an Employee:

1. Navigate to Employee > Employee Resignation.
2. Search for the employee by code, enroll number, or name.
3. Select the employee.
4. Tick the checkbox to confirm resignation.
5. Enter the resignation date.
6. Select the resignation status (create new if needed).
7. Add optional comments.
8. Click "Resign" to finalize.

Cancelling a Resignation:

1. Navigate to Employee > Employee Resignation.
2. Click the Organization Structure icon.
3. Click "More Options."
4. Check "Included All Resign" and click "View."
5. Search for the resigned employee.
6. Select the employee.
7. Click the "Cancel Resign" button.

Additional Notes:

- Resigned employees are no longer visible in most workforce reports and forms.
- Resigned employee data is retained for historical purposes.
- System access for resigned employees is typically revoked.

Screenshots:

GlobalTA&HR HELP : 09 9400 505 00

Kaung Myat Thu
Store Keeper

Dashboard
Master
Employee
Employee Setup
Opening Leave Balance
Employee Policy
Employee Resignation
Custom Field Setup
Time Attendance
Human Resource
Payroll Management
User Level Management
System
Report

Employee Resignation

EMPLOYEE INFORMATION ADDITIONAL INFORMATION

Enroll Number Employee Code

Name Designation Group Policy

DOE Email

User Level Department

Company Card ID

Resign

Resign

Resign Date: 12/25/2023 Last Working Date: 12/24/2023 Status: Select Status ...

Comment Remark

Resign

3. Module: Attendance

Feature: Attendance Process

Purpose:

- Manages check-in/out times from various devices and sources
- Displays attendance data in a clear format
- Calculates attendance, overtime, and leave
- Applies attendance rules
- Generates reports
- Integrates with payroll
- Integration with Devices and Data Sources:
 - Mobile App
 - Fingerprint Device
 - Bluetooth Device
 - Manually entered data
 - Approved attendance requests

Accessing the Attendance Process Menu:

1. Click the Time Attendance tab in the left menu panel.
2. Click Attendance Process.

Key Functionalities:

Manual Attendance Form

- Purpose:
 - Default view for attendance data
 - Displays In/Out times, leaves, overtime, and attendance rules
 - Allows for manual editing of attendance

Attendance Editor

- Purpose:
 - Provides advanced editing options for attendance data
 - Deletes/hides/adds press times

- Views attendance by shift or day
- Generates attendance based on custom times or assigned shifts
- Imports attendance data from Excel

Add Press Time

- Purpose:
 - Adds or generates press times (In/Out times)
 - Generates press times based on custom times or assigned shifts
 - Imports press times from Excel

Attendance Calculation

- Purpose:
 - Calculates attendance-related data (In/Out times, leaves, overtime, etc.)
 - Must be performed before generating reports or for payroll

“Import Excel”

- Purpose:
 - Imports attendance data in bulk from Excel
 - Separate templates for press times and leave data

Attendance Rule

- Purpose:
 - Displays calculated attendance values (hours/minutes/days)
 - Applies attendance rules and calculations

Screenshots:

Attendance Process / Time Attendance / Attendance Process

Period: Last Week FromDate: 12/17/2023 ToDate: 12/23/2023

Name	Date	In Time	Out Time	Leave Name	Shift Name	AbsentDays	ActualWorking...	AfterResignDays	ConfirmOTMin
Aung Aung H1	12/17/2023				Main Shift				

Page 1 of 1 | 15 items per page | 1 - 1 of 1 items

Attendance Editor / Time Attendance / Attendance Process

Inactive

Name	Date	Comment	Press_Time1
Aung Aung H1	12/17/2023		
Aung Aung H1	12/18/2023		
Aung Aung H1	12/19/2023		
Aung Aung H1	12/20/2023		
Aung Aung H1	12/21/2023		
Aung Aung H1	12/22/2023		
Aung Aung H1	12/23/2023		

Page 1 of 1 | 15 items per page | 1 - 7 of 7 items

Feature: Duty Roster

Purpose:

- Assign work shifts to employees based on their specific duties and tasks.
- Plan and organize workforce schedules effectively.

Prerequisites:

- Shifts must be pre-defined in the Shift Policy module.

Key Points:

- Assign shifts to employees individually or in bulk.
- View and manage duty rosters by date, employee, or shift.
- Export duty rosters to Excel for reporting or analysis.
- Import duty rosters from Excel for quick and easy scheduling.
- Filter and search duty rosters by various criteria.

How to Use Duty Roster:

1. Access the Duty Roster:
 - Go to the Time Attendance module.
 - Click on Duty Roster.
2. Choose a Period:
 - Select the time period for which you want to view or assign duty rosters (e.g., Today, This Week, This Month, Custom).
3. Select Employees:
 - Choose the employees you want to include in the duty roster using the Organization Tree or Filter by Employee options.
4. Preview Duty Roster:
 - Click the Preview button to view the current duty roster for the selected employees and period.
5. Assign Duty Roster:
 - Method 1: Show Assign Buttons:
 - Check the Show Assign Buttons checkbox.
 - Select a shift and leave type for each date.
 - Click on the Shift Short Code Name box under the date to assign the duty.
 - Click Publish to confirm the assignments.
 - Method 2: Pop-Up Window Box:
 - Click on the Shift Short Code Name box under the date you want to change.
 - Select a shift and leave type in the pop-up window.

- Choose an assignment frequency (e.g., Doesn't Repeat, Daily, Workdays).
- Click Update.
- Click Publish to confirm the assignments.
- Method 3: Excel Import:
 - Click the “Download Template” icon  to download the Excel template.
 - Fill in the template with shift short codes, leave short codes, and employee names.
 - Click the “Import Excel” icon .
 - Select the filled template file.
 - Click Validate Data.
 - Click Import Data.

6. Additional Options:

- Reset: Revert to the previous duty roster.
- Copy this assigned data: Duplicate assignments for other dates or employees.
- Cancel this assigned data: Remove assignments.
- Apply this row data to all employees: Apply assignments horizontally for all employees.
- Apply this column data to all employees: Apply assignments vertically for all employees.
- View Roster Transaction: View the history of changes to the duty roster.

7. Export Duty Roster:

- Click the “Export Excel” icon  to create an Excel report of the duty roster.
- Check the Show Shift Duty In/Out checkbox to include shift timings in the report.

Benefits of Using Duty Roster:

- Improved workforce planning and scheduling
- Enhanced communication and coordination
- Reduced confusion and errors
- Facilitated time-off requests
- Increased compliance with labor laws and company policies

Screenshots:

GlobalTA&HR HELP : 09 9400 505 00

Duty Roster / Time Attendance / Duty Roster

Period: Payment Period By This Month (11/26/2023 - 12/25/2023)

Show Assign Buttons Show Shift DutyIn/Out

Name #	TotalWorkingHours	Nov-26(Sun)	Nov-27(Mon)	Nov-28(Tue)	Nov-29(Wed)	Nov-30(Thu)	Dec-01(Fri)	Dec-02(Sat)	Dec-03(Sun)	Dec-04(Mon)	Dec-05(Tue)	Dec-
Aung Aung 1	192.00 Hr	MS OFFDAY	MS WORKFROM...	MS OFFDAY	MS OFFDAY							
Aung Paing 7	192.00 Hr	NS OFFDAY	NS OFFDAY	NS OFFDAY								
NAW SAY WAH SHEE 15	16.67 Hr	23 OFFDAY	23 OFFDAY	23 OFFDAY								
KYAW MG MG LWIN(U) 34	192.00 Hr	NS OFFDAY	NS OFFDAY	NS OFFDAY								
WAI YAN TUN(U) 36	192.00 Hr	NS OFFDAY	NS OFFDAY	NS OFFDAY								

Page 1 of 3 | 15 Items per page | 1 - 15 of 39 Items

GlobalTA&HR HELP : 09 9400 505 00

Duty Roster / Time Attendance / Duty Roster

Period: Payment Period By This Month (11/26/2023 - 12/25/2023)

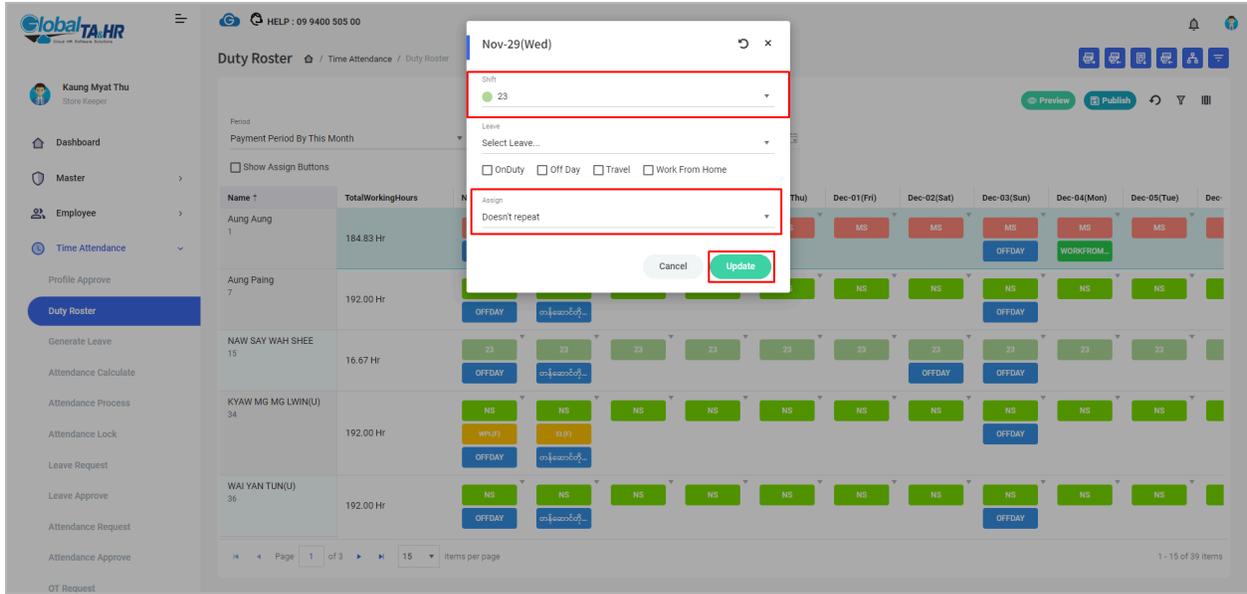
Show Assign Buttons Show Shift DutyIn/Out

Shift: 23 | Leave: Select Leave...

OnDuty Off Day Travel Work From Home

Name #	TotalWorkingHours	Nov-26(Sun)	Nov-27(Mon)	Nov-28(Tue)	Nov-29(Wed)	Nov-30(Thu)	Dec-01(Fri)	Dec-02(Sat)	Dec-03(Sun)	Dec-04(Mon)	Dec-05(Tue)	Dec-
Aung Aung 1	184.83 Hr	MS OFFDAY	MS OFFDAY	MS OFFDAY	23 OFFDAY	MS OFFDAY	MS OFFDAY	MS OFFDAY	MS OFFDAY	MS WORKFROM...	MS OFFDAY	MS OFFDAY
Aung Paing 7	192.00 Hr	NS OFFDAY	NS OFFDAY	NS OFFDAY								
NAW SAY WAH SHEE 15	16.67 Hr	23 OFFDAY	23 OFFDAY	23 OFFDAY								
KYAW MG MG LWIN(U) 34	192.00 Hr	NS OFFDAY	NS OFFDAY	NS OFFDAY								
WAI YAN TUN(U) 36	192.00 Hr	NS OFFDAY	NS OFFDAY	NS OFFDAY								

Page 1 of 3 | 15 Items per page | 1 - 15 of 39 Items



Feature: Shift Policy

Purpose:

- Define and manage various work shifts within the organization.
- Set rules and conditions for each shift, such as:
 - Start and end times
 - Break times
 - Overtime rules
 - Late arrival and early departure allowances
 - Half-day absence rules

Key Points:

- Create and manage multiple shift policies.
- Assign shifts to employees in the Duty Roster module.
- Use shift policies in attendance calculations and reports.
- Integrate with the Mobile App for employee check-ins and outs.

How to Use Shift Policy:

1. Access the Shift Policy:
 - Go to the Master module.

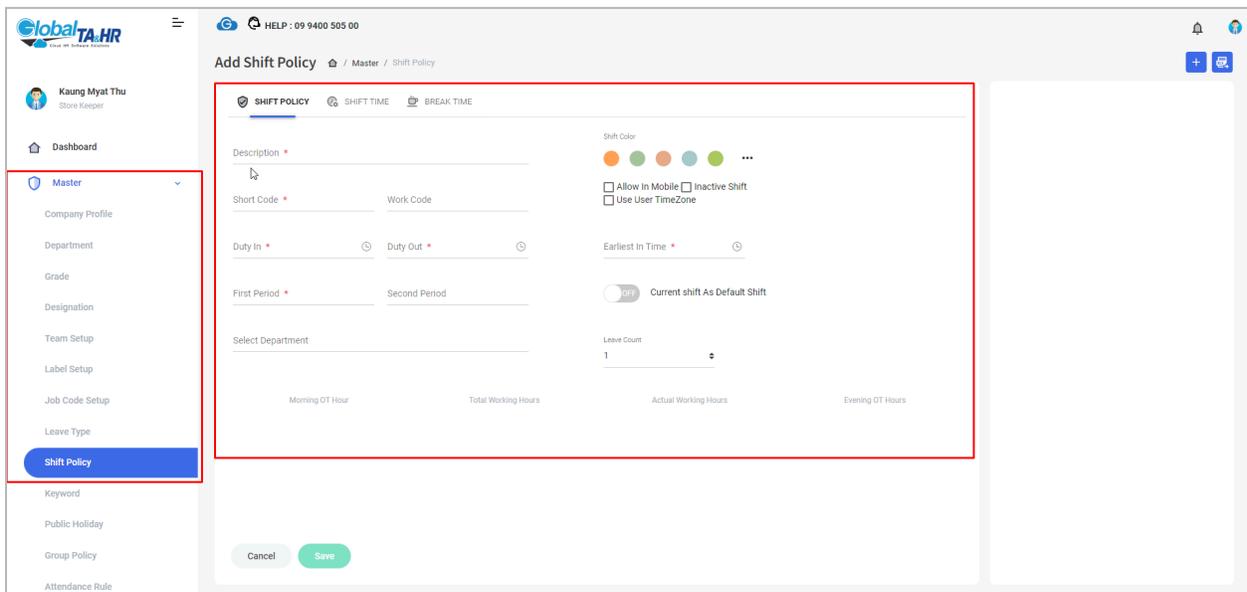
- Click on Shift Policy.
- 2. Create a New Shift Policy:
 - Click the "Add New"  button.
 - Fill in the following details:
 - Description (name of the shift)
 - Short Code (unique identifier)
 - Work Code (optional code for external systems)
 - Shift Color (for visual distinction)
 - Allow in Mobile (enable for Mobile App use)
 - Inactive Shift (toggle to deactivate)
 - Use User TimeZone (for employees in different time zones)
 - Duty In (start time)
 - Duty Out (end time)
 - Earliest In Time (earliest allowed check-in)
 - Late Minutes (threshold for considering an employee late)
 - Half Absent (rules for half-day absences)
 - Current Shift As Default Shift (for imports)
 - Select Department (restrict usage to specific departments)
 - Leave Count (set leave entitlements for the shift)
- 3. Set Shift Times:
 - Click the "Shift Time" tab.
 - Define:
 - Late Start Time
 - Earliest Out Time
 - MOT Start Time (morning overtime start)
 - Last MOT Start Time (last time for morning overtime)
 - Evening OT Start Time
 - Evening OT End Time
- 4. Add Break Times (optional):
 - Click the "Break Time" tab.
 - Click "Add Break Time."
 - Fill in:
 - Description (name of the break)
 - Break Out (start time)
 - Break Out Gap/Min (duration)
 - Break In (end time)
 - Break In Gap/Min (gap between break and work resumption)
 - Exclude in Working Hour (toggle to exclude from working hours)
- 5. Save the Shift Policy:

- Click the "Save" button.

Tips:

- Use descriptive names and short codes for easy identification.
- Set appropriate overtime and late arrival rules based on company policies.
- Consider break times and how they should be calculated in working hours.
- Assign shifts to employees in the Duty Roster module to manage their schedules.

Screenshots:



GlobalTA&HR HELP : 09 9400 505 00

Kaung Myat Thu
Store Keeper

Dashboard

Master

- Company Profile
- Department
- Grade
- Designation
- Team Setup
- Label Setup
- Job Code Setup
- Leave Type
- Shift Policy**
- Keyword
- Public Holiday
- Group Policy
- Attendance Rule

Add Shift Policy / Master / Shift Policy

SHIFT POLICY SHIFT TIME BREAK TIME

Late Start Time Earliest Out Time

MOT Start Time Last MOT Start Time

Evening OT Start Time Evening OT End Time

Cancel Save

GlobalTA&HR HELP : 09 9400 505 00

Kaung Myat Thu
Store Keeper

Dashboard

Master

- Company Profile
- Department
- Grade
- Designation
- Team Setup
- Label Setup
- Job Code Setup
- Leave Type
- Shift Policy**
- Keyword
- Public Holiday
- Group Policy
- Attendance Rule

Add Shift Policy / Master / Shift Policy

SHIFT POLICY SHIFT TIME BREAK TIME

+ Add Break Time

Name	Break Out/in	Action
No records available.		

Page 0 of 0 15 Items per page 0 - 0 of 0 items

Cancel Save

Feature: Duty Swap

Purpose:

- Allow employees with the same responsibilities but different work schedules to exchange shifts.
- Accommodate emergencies, personal needs, or scheduling preferences.

Key Points:

- Two-way swap: Exchange shifts with one other employee.
- Mobile App access: Request and approve swaps through the Global TA Cloud Mobile App.
- Approver confirmation: Supervisors or managers can approve or reject swap requests based on designated settings.
- Reason and remarks: Provide details about the swap request and add any necessary comments.
- Pending and approved lists: Track the status of swap requests and view a list of approved swaps.

How to Use Duty Swap:

As a Requester:

1. Open the Global TA Cloud Mobile App.
2. Go to "More Settings"  > Duty Swap Request.
3. Click the "+" icon to create a new request.
4. Select the "For" date and shift you want to swap.
5. Select the "With" date and shift you want to receive.
6. Choose the substitute team member you want to swap with.
7. Select the request type:
 - Job Requirement: Swap due to work-related reasons.
 - Personal: Swap due to personal reasons.
8. ** Briefly explain the reason for your swap request.**
9. Click Send to submit the request.

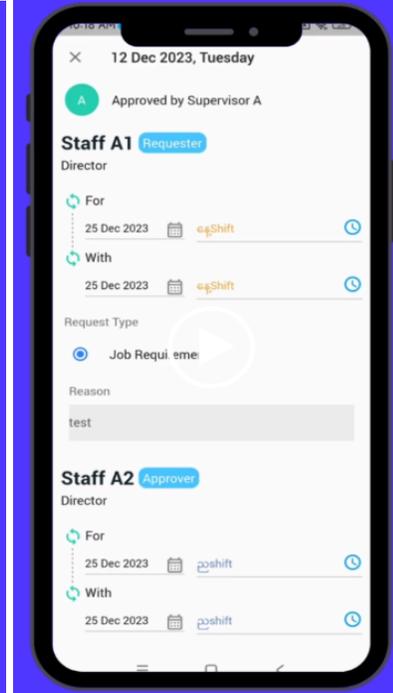
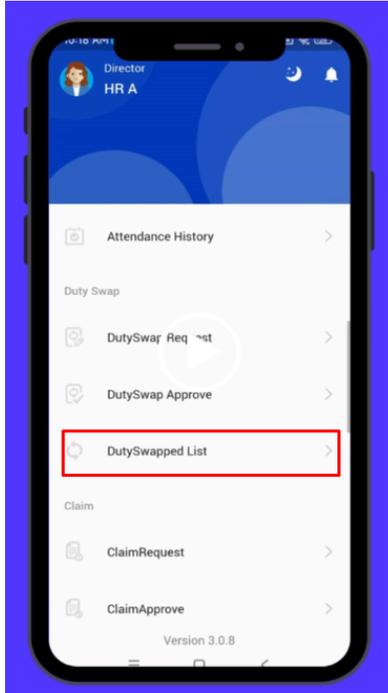
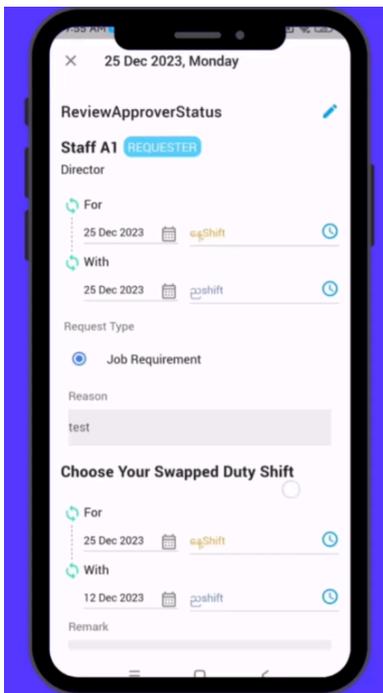
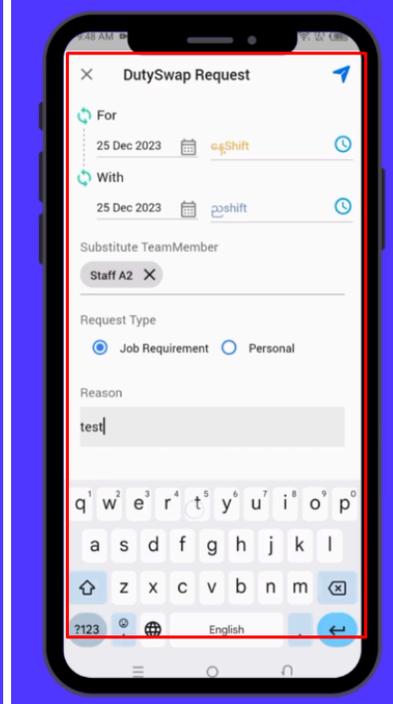
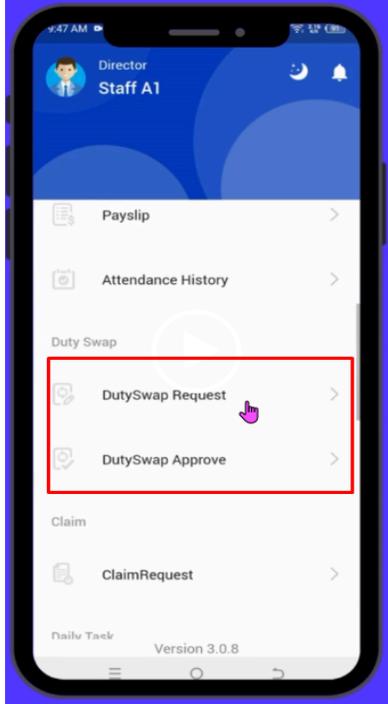
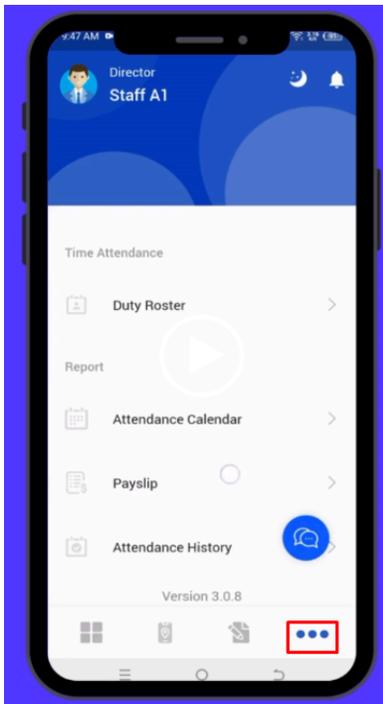
As an Approver:

1. Open the Global TA Cloud Mobile App.
2. Go to “More Settings”  > Duty Swap Approve.
3. Click the "Pending Tab" to view pending swap requests.
4. Open the relevant Duty Swap Pending List.
5. Review the requested swap details, including dates, shifts, and reason.
6. Add any remarks if needed.
7. Click “Approve” to confirm the swap.
8. Click “Reject” if you cannot approve the swap.

Accessing Duty Swap List:

1. Open the Global TA Cloud Mobile App.
2. Go to “More Settings”  > DutySwapped List.
3. View the list of approved and pending Duty Swaps.
4. For pending swaps, review details and take necessary actions (Approve/Reject) based on the designated approver settings.

Screenshots:



Feature: Group Policy

Purpose:

- To establish a unified set of rules and permissions governing attendance, leave, overtime, payroll, and GPS location tracking for employees.
- To ensure consistency and fairness in the application of company policies.

Key Pints:

- Multiple group policies: Allows for different policies to be applied to different employee groups or departments.
- Comprehensive coverage: Addresses a wide range of attendance-related topics, including overtime, leave, GPS tracking, and payroll calculations.
- Customizable options: Can be tailored to meet the specific needs of each organization.
- Mobile app integration: Works seamlessly with the Global TA Cloud Mobile App for employee requests and approvals.

How to Use Group Policy:

1. Create a new group policy:
 - Navigate to Master > Group Policy.
 - Click "Add New" .
 - Enter a descriptive name for the policy.
 - Select the desired options for each tab:
 - Group Policy: General settings, such as whether to allow overtime requests and duty swaps.
 - Rule List: Attendance-related rules (e.g., lateness, early departure).
 - Payment Rule List: Payroll-related rules (e.g., basic salary, benefits).
 - Leave Policy List: Leave types and allowances.
 - GPS Location List: Designated check-in/out locations.
 - Attendance Policy List: Request options available in the mobile app.
 - OT Policy List: Overtime calculation methods and restrictions (if applicable).

2. Assign the group policy to employees:
 - Assign the policy to individual employees during the employee setup process.
 - Alternatively, assign it to a group of employees in Employee > Employee Policy.

Additional Notes:

- The OT Policy List tab is only available if the "Use OT Approve Policy" option is enabled in System > Application Option.
- Contact Global TA & HR for assistance with rule confirmation or policy customization.

Tab: Group Policy

Purpose:

- To establish general settings related to overtime, duty swaps, and maximum overtime hours.

Steps:

1. Access the tab:
 - Click the "Group Policy" tab within the Group Policy section.
2. Create a new policy:
 - Click the "Add New" .
 - Enter a descriptive name for the policy.
3. Configure general settings:
 - Current Group Policy As Default: Check this box to automatically assign the new policy to new employees.
 - Inactive: Check this box to hide the policy from view.
4. Set overtime request options:
 - Allow Overtime Request: Check this box to allow employees to request overtime.
 - Allow Duty Swap Request: Check this box to allow employees to request duty swaps.

- Allow Max OT Hour: Check this box to enable a maximum limit for overtime hours.
 - Select the desired restrictions for overtime and duty swap requests:
 - Before OT Day
 - After OT Day
 - Before & After OT Day
 - Between OT Day
 - During OT Day
 - No Restriction
5. Additional options:
- Include From/To (OT will calculate By Employee Request Time): Check this box to calculate overtime based on employee-requested times.
 - Mobile: Check this box to count any time requested via the mobile app as overtime.
 - Notify Only (OT will calculate by Shift): Check this box to calculate overtime based on assigned shifts.
 - Allow Duty Swap Before And After Off Day: Check this box to allow duty swaps before and after weekends.
6. Save the policy:
- Click the "Save" button.

Additional Notes:

- The Rule List and Payment Rule List tabs are used to configure more specific attendance and payroll rules, respectively.
- The Leave Policy List tab is used to define leave types and allowances.
- The OT Policy List tab (if enabled) is used to set overtime calculation methods and restrictions.

Tab: Rule List

Purpose:

- To configure specific attendance rules that will be applied to employees based on the selected group policy.

Steps:

1. Access the tabs:
 - Click the "Rule List" tab within the Group Policy section.
2. Review available rules:
 - The available rules will be listed, organized by category.
 - The specific rules displayed will depend on the user organization's attendance policies.
3. Select applicable rules:
 - Check the boxes next to the rules that you want to include in the group policy.
 - If you're unsure about a rule's meaning or application, consult with your HR team.
4. Review rule details (optional):
 - Click on a rule's name to view more detailed information about its definition and usage.
5. Save the policy:
 - Click the "Save" button to apply the selected rules to the group policy.

Additional Notes:

- The Rule List tab works in conjunction with the general settings in the Group Policy tab.
- Some rules may have additional configuration options that can be accessed by clicking on the rule name.
- If you need to modify the available rules or create new ones, contact Global TA & HR for assistance.
- The Rule Confirmation Letter - User Policy serves as a reference for the initial rule selections.
- Contact Global TA & HR for support with rule configuration or policy changes.

Tab: Leave Policy List

Purpose:

- To define the types of leave available to employees within a group policy, along with their specific allowances, restrictions, and calculation rules.

Steps:

1. Access the tab:
 - Click the "Leave Policy List" tab within the Group Policy section.
2. Select leave types:
 - Check the boxes next to the leave types you want to include in the policy.
 - These types should have already been defined in the Master > Leave Type section.
3. Configure leave options for each selected type:
 - Leave Start Date: Choose when the leave year begins (Company Default, DOE, or Permanent Date).
 - Max Day: Set the maximum number of days allowed per year for this leave type.
 - Max Continuous Day: Set the maximum number of consecutive days that can be taken for this leave type.
 - Min Continuous Day: Set the minimum number of consecutive days that must be taken for this leave type.
 - Use Monthly Rate: Check this box to allocate leave on a monthly basis instead of annually.
 - Monthly Rate: If using a monthly rate, specify the number of days granted per month.
 - Period: Set the frequency at which the leave allowance is refreshed (Per Year, Per Month, or other options).
 - Use Permanent Date: Check this box to start the leave allowance from the employee's permanent date.
 - Service Month: If applicable, specify the number of service months required before leave entitlement begins.
 - Use Full Day Leave: Check this box to only allow full-day leave requests in the mobile app.
 - Deduct Pending From Balance: Check this box to immediately deduct pending leave requests from the balance.
 - Use Custom Rules: Check this box to apply custom rules written in code for specific leave conditions.
4. Additional setup (optional):
 - Click "Addition" to access further options for leave requests, carry-over, deductions, combining leave types, and more.
 - Review and configure these options as needed.
5. Save the policy:
 - Click the "Save" button to apply the leave settings to the group policy.

Additional Notes:

- The available leave types and options will depend on your organization's specific leave policies.
- Contact Global TA & HR for assistance with configuring custom rules or if you have any questions about leave policy setup.
- To add a new leave type, use the "Add Leave Type" function.

Tab: Attendance Policy List

Purpose:

- To determine which attendance request options will be available to employees within a group policy, specifically within the Global TA Cloud Mobile App.

Steps:

1. Access the tab:
 - Click the "Attendance Policy List" tab within the Group Policy section.
2. Select available request types:
 - Check the boxes next to the attendance request types you want to enable for employees:
 - Use Intime (request work time)
 - Use Outtime (request time off work)
 - Use Ferry Late (request for working hours adjustment)
 - Use OnDuty (request for working outside the designated location all day)
 - Use Travel
 - Use Off Day
 - Use Work From Home
3. Configure request restrictions (optional):
 - Allow Attendance Request?: Choose when employees can submit attendance requests:
 - Before Attendance Day
 - After Attendance Day
 - Before & After Attendance Day
 - Between Attendance Day
 - During Attendance Day
 - No Restrictions

- Allow Max Attendance Request: Check this box to set a maximum number of attendance requests allowed per employee.
4. Save the policy:
- Click the "Save" button to apply the attendance request settings to the group policy.

Additional Notes:

- The available request types and restrictions may vary depending on your organization's specific attendance policies.
- The selected request types will be visible in the Global TA Cloud Mobile App for employees within the group policy.
- Contact Global TA & HR for assistance with configuring attendance request options or if you have any questions about the Attendance Policy List.

Tab: OT Policy List (if enabled)

Purpose:

- To establish rules for calculating and restricting overtime hours, aligning with different overtime types and work shifts.

Availability:

- This tab is only visible if the "Use OT Approve Policy" option is enabled in System > Application Option.

Key Features:

- Define multiple OT policies to accommodate different overtime scenarios.
- Specify how overtime hours are calculated based on employee requests, work shifts, or Duty In/Out times.
- Apply restrictions on overtime hours, including limits on total hours and deductions for specific time ranges.

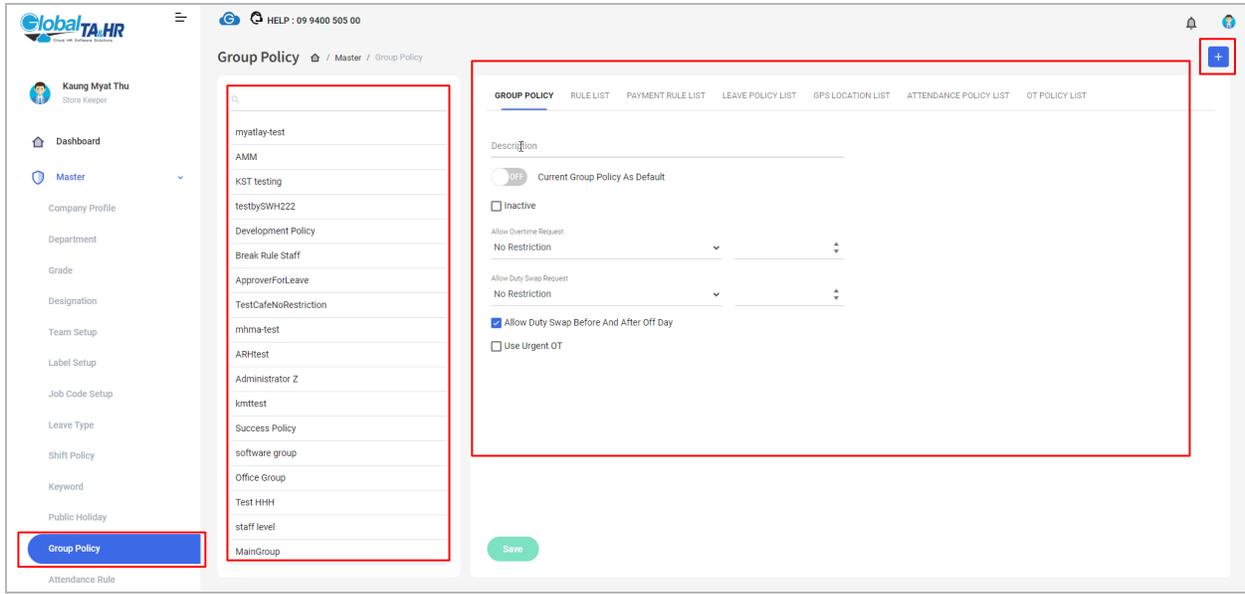
Steps to Configure OT Policies:

1. Create a new policy:
 - Click "Add OT Policy."
 - Enter a descriptive policy name.
2. Select OT type:
 - Choose Normal OT, Offday OT, or Holiday OT.
3. Choose shifts:
 - Select the work shifts to which the policy will apply.
4. Set calculation method:
 - Choose either "OT will calculate by Employee's Request Time" or "OT will calculate by DutyIn – DutyOut."
 - If using "Allowed Shifts," specify whether to calculate OT based on employee requests or work shifts for shifts not in the Select Shift list.
 - Optionally, check "Include From/To" to calculate OT only based on employee requests within specified time ranges.
5. Add restricted OT hours (optional):
 - Click "Add Restricted OT Hr" to create rules for limiting OT hours.
 - Enter the allowed time range and the amount of overtime to be deducted.
6. Save the policy:
 - Click "Save" to apply the OT policy.

Additional Notes:

- The OT Policy List works in conjunction with the "Use OT Approve Policy" setting.
- The Mobile Apps will display the "ApprovedOTHour by OTPolicy" function, indicating the calculated OT hours based on the applicable policy.
- Contact Global TA & HR for assistance with configuring OT policies or if you have any questions about the OT Policy List.

Screenshots:



Feature: Device Mapping

Purpose:

- This guide explains how to connect fingerprint and Bluetooth devices to employees in Global TA Cloud, enabling them to use these devices for attendance recording and access control.

Key Points:

- Device mapping links specific devices to individual employees.
- You can choose from various file types (Bluetooth, Fingerprint, etc.).
- Filter employees for efficient mapping.
- Additional options allow viewing existing device mappings and clearing device data.

Step-by-Step Instructions:

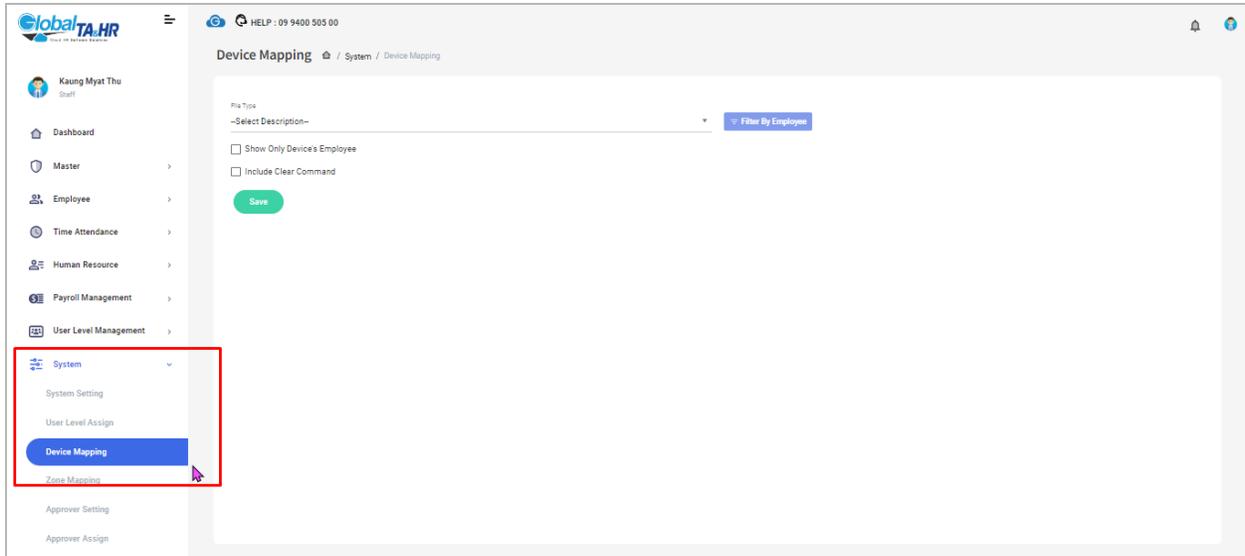
1. Accessing Device Mapping:
 - Open the Global TA Cloud web URL in your browser.

- In the left menu panel, go to System and select Device Mapping.
- 2. Mapping Devices:
 - Choose the device type from the File Type option.
 - Click Filter By Employee to select specific employees.
 - Check the boxes next to the desired employees.
 - Click Select.
 - Click Save to complete the mapping.
- 3. Additional Options:
 - Show Only Device's Employee: View employees already mapped to the selected device by choosing its file type.
 - Include Clear Command: When mapping, this option erases old data on the device and sets it for the chosen employee.
- 4. Important Notes:
 - Device Configuration: Contact the Global TA & HR Cloud Operator Team or Service Team to initially set up the device configuration and provide the device serial number.
 - Internet Connection: Ensure the device has internet access and the ADMS (Automatic Data Master Server) function is enabled.

Remember:

- Proper device mapping is crucial for accurate attendance recording and access control using fingerprint and Bluetooth devices.
- Always consult with the Global TA & HR Cloud service team for initial device setup and assistance.

Screenshots:



Feature: Zone Mapping

Purpose:

- This guide explains how to assign employees to designated zones in Global TA Cloud, enabling location-based attendance tracking and access control.

Key Points:

- Zone mapping links specific zones to individual employees.
- Zones can represent physical locations or virtual boundaries.
- Filter employees for efficient mapping.
- View existing zone mappings based on file type.

Step-by-Step Instructions:

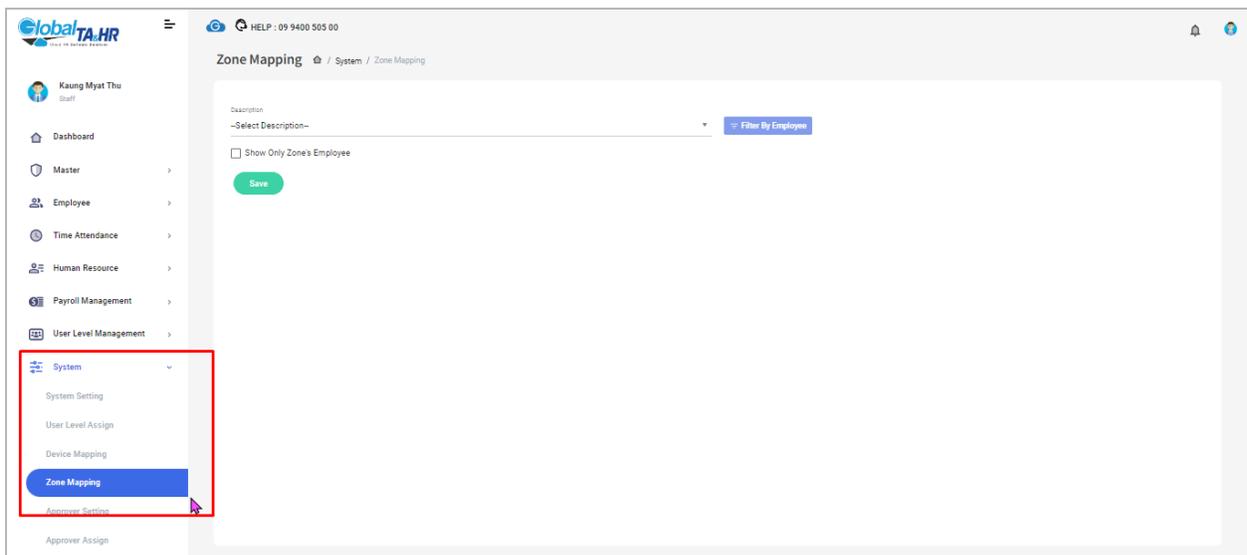
1. Accessing Zone Mapping:
 - Open the Global TA Cloud web URL in your browser.
 - In the left menu panel, go to “System” and select “Zone Mapping”.
2. Mapping Zones:
 - Choose the desired zone from the Description list.
 - Click Filter By Employee to select specific employees.

- Check the boxes next to the desired employees.
 - Click Select.
 - Click Save to complete the mapping.
3. Additional Options:
- Show Only Zone's Employee: View employees already mapped to the selected zone by choosing its file type.
4. Important Notes:
- Zone Configuration:
 - Contact the Global TA & HR Cloud Operator Team or Service Team for initial setup.
 - Provide the zone location details.
 - Alternatively, create zones under “Master” >> “GPS Location”.
 - GPS Location Creation: Create GPS locations before zone mapping.

Remember:

- Zone mapping is essential for accurate location-based attendance and access control.
- Create GPS locations before defining zones.

Screenshots:



4. Module: HR

Feature: Dashboard

Purpose:

- To provide a visual overview of important Attendance/HR/Payroll data in a customizable and user-friendly format
- To enable users to personalize their Dashboard experience for efficient information access

Key Points:

- Dashboard is the first page users see after logging in
- Gadgets display data graphically for easy interpretation
- Dashboard can be customized with multiple pages, layouts, and gadgets
- Data can be filtered by organizational structure and date range

Step-by-Step Instructions:

Accessing the Dashboard:

- Log in to the Global TA Cloud web software
- Select "Dashboard" in the left menu panel

Dashboard Configuration:

- Adding Dashboard Pages:
- Click the "Configuration icon"
- Enter a name for the new page
- Click "ADD"

Changing View Layout:

- Click the "Layout icon"
- Choose a layout from the options

Organizational Structure:

- Click the "Organization Structure" icon
- Select the desired department or company
- Click "Refresh" icon

Using and Removing Gadgets:

Adding Gadgets:

- Click "+ Add Gadget icon" or "Add Gadget"
- Select a gadget and click "Add"

Removing Gadgets:

- Click the "Delete icon" in the top right corner of the gadget

Available Gadgets:

Summary: (View overall summaries and trends)

- Monthly Requests Summary
- Monthly Attendance Summary
- Daily Attendance Summary
- Attendance Employee Counts by Graph
- Labor Cost by Company
- Employee Age Report
- Total Labor Cost per Company
- Labor Cost per Headcount

My Attendance: (View personal attendance information)

- My Daily Attendance
- My Monthly Attendance
- My Leave History

Team: (View team-related information)

- My Team
- Leave Requested by Teammates
- Tasks Status Count
- Manpower List

News: (View announcements and updates)

- Teammates' Birthdays
- Upcoming Holidays
- Monthly Announcements
- Permanent Employee List

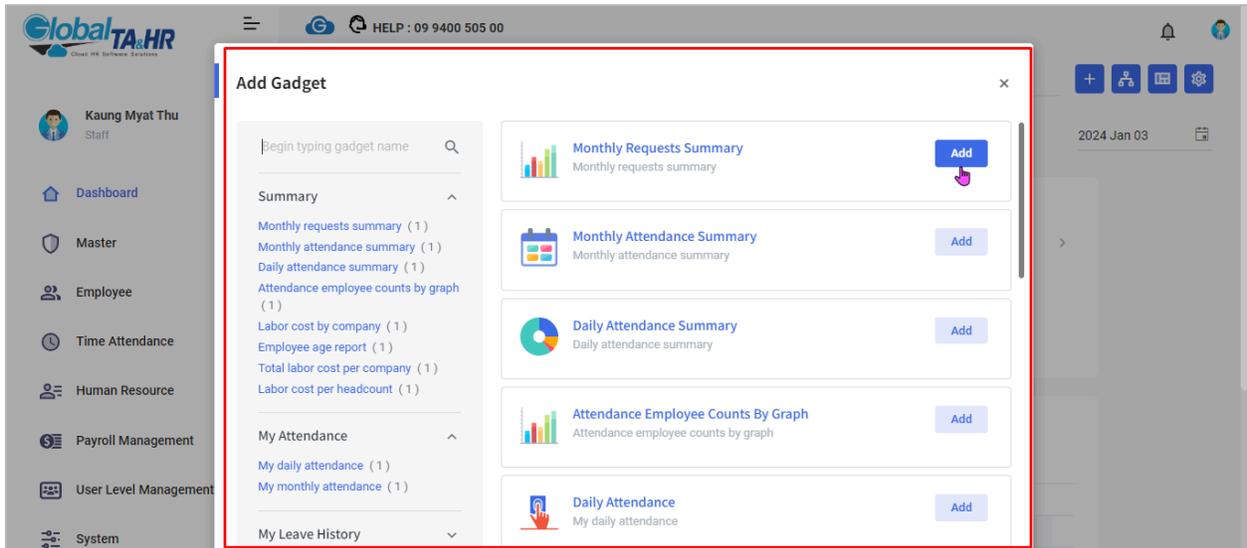
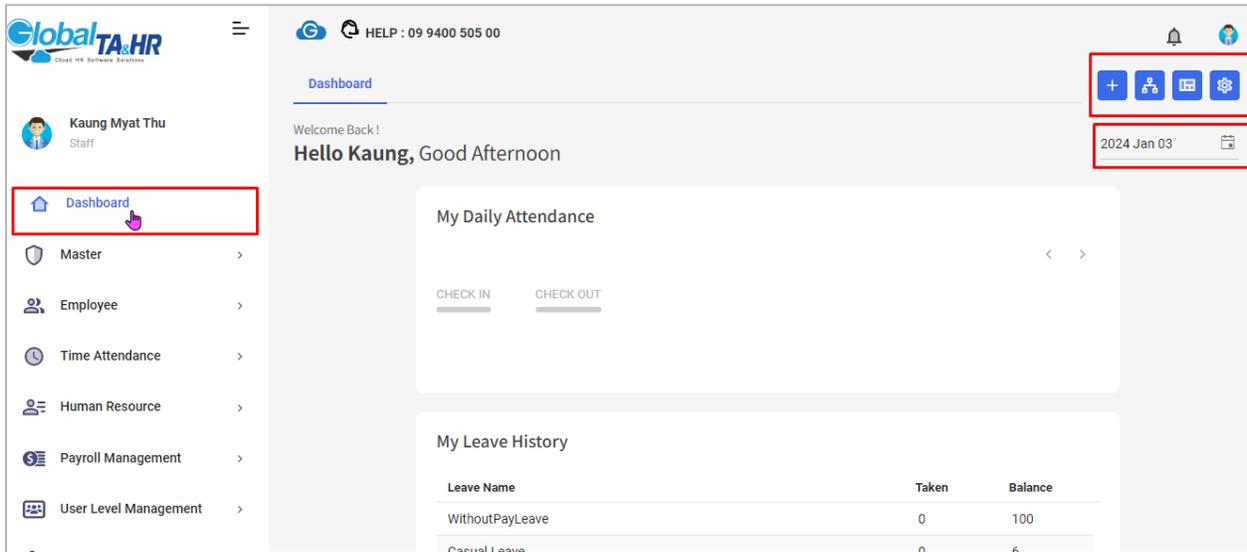
Specifying Dashboard Date:

- Click "Date" to select a specific date range for data display

Additional Information:

- Watch the sample video for a visual demonstration: [Dashboard Setup Link]
- Experiment with different layouts and gadgets to find the most informative and useful setup for your needs
- Regularly review and update your Dashboard configuration to ensure it aligns with your current priorities

Screenshots:



Feature: Announcement

Purpose:

- Share important company information, policies, news, and events with employees in a timely and efficient manner.
- Increase employee engagement and awareness of key organizational updates.
- Provide a centralized platform for storing and accessing announcements.

Key Points:

- Create Posts:
 - Add announcement titles and reference numbers.
 - Compose detailed messages with rich text formatting and image insertion.
 - Attach PDF files for additional information.
 - Select target audience by department, designation, employee, location, etc.
 - Decide on public visibility (publish immediately or schedule for later).
- Manage Posts:
 - Edit announcement content and settings.
 - Delete unwanted posts.
 - Track post performance with viewership reports for seen and unseen employees.
- Employee Access:
 - View announcements on the Global TA Cloud web and mobile app dashboards.
 - Filter announcements by category and date.
 - Mark announcements as seen or unread.

Step-by-Step Guide to Creating an Announcement:

1. Create Post:

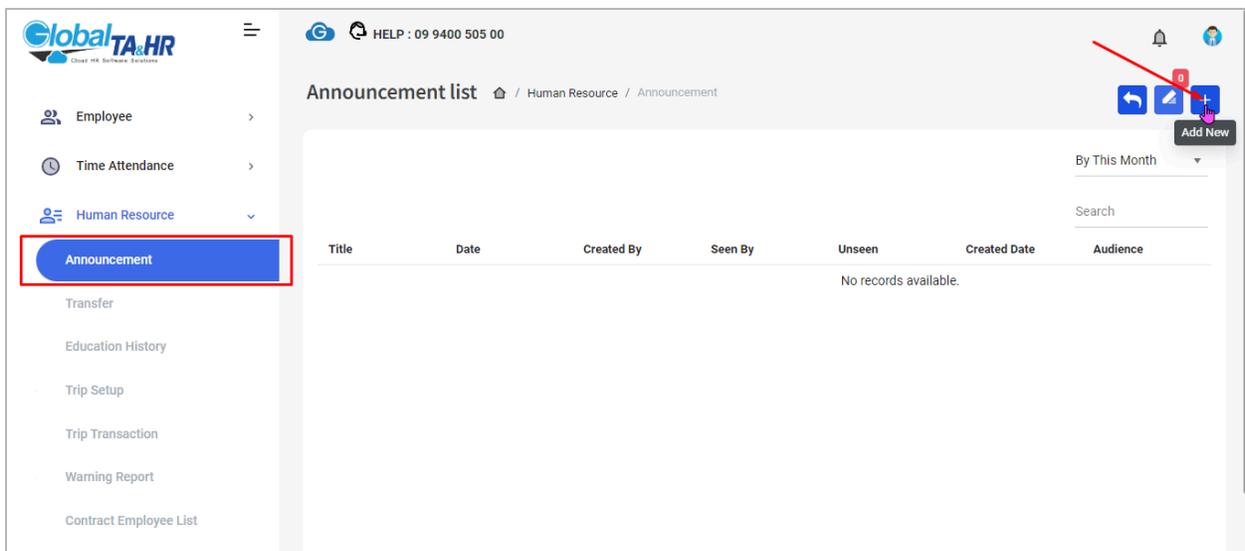
- Click the + Add New icon .
- Enter a title and reference number.
- Craft your announcement message with text formatting and (optional) image.
- Attach a relevant PDF file if needed.

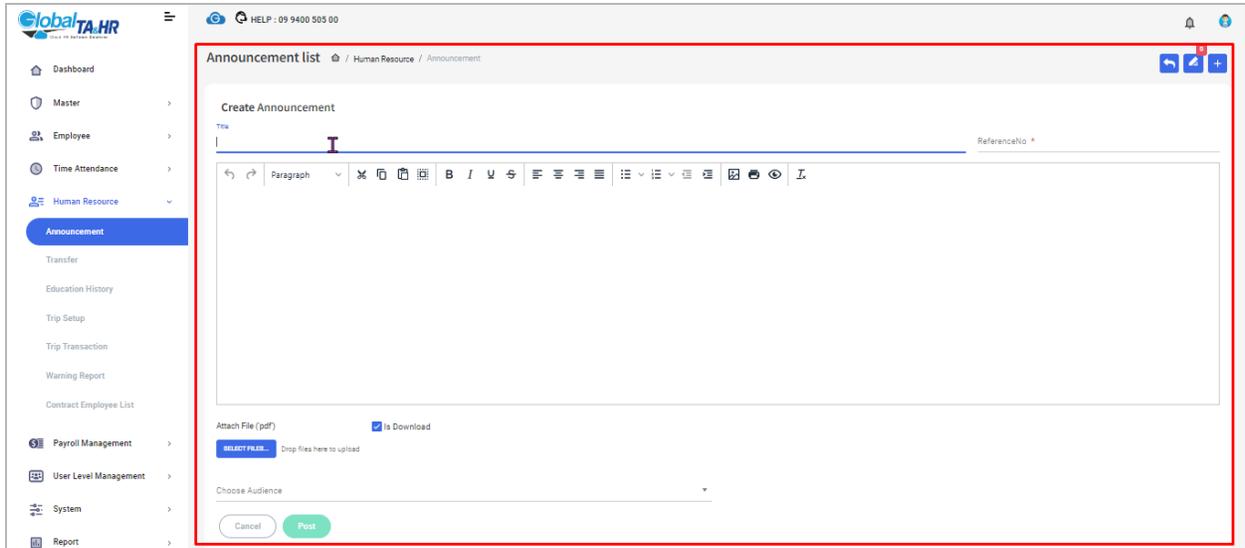
- Choose your target audience using various department, employee, or location filters.
 - Decide whether to publish the announcement immediately or schedule it for later.
2. Manage Posts:
- You can edit content, visibility settings, and audience targeting after creation.
 - Delete unwanted announcements.
 - View reports on how many employees have seen or unread the announcement.
3. Employee Access:
- Employees can see announcements on their Global TA Cloud dashboards (web and mobile).
 - Filter announcements by category and date for easy navigation.
 - Mark announcements as seen or unread for personal organization.

Additional Tips:

- Use clear and concise language in your announcements.
- Highlight important information with bold text or bullet points.
- By utilizing the Announcement module effectively, you can keep your employees informed, engaged, and aligned with organizational goals.

Screenshots:





Feature: Contract Employee List

Purpose:

- Separates contract employees (those working for a limited period) from permanent employees within the system.
- Stores essential contract details for efficient management.

Key Points:

- Add New Contract Employee:
 - Enter contract details (date, start/end dates, compensation, status, number, shift, remarks).
 - Add employers or witnesses if required.
- “Import Excel” Data:
 - Manage multiple contracts using a template.
 - “Download template” , fill in mandatory fields (red headers), and import.
 - Validate data before importing.
- Find Contract Employee List:
 - Filter by period, employee, contract type, and other criteria.
 - Preview and export data to Excel.

Step-by-Step Guide to Creating a New Contract Employee:

Add New Contract Employee:

1. Access the Contract Employee List:

- From the left menu panel, navigate to "Human Resource."
- Select "Contract Employee List."

2. Add New Contract Employee (Manual Entry):

- Click "Add New." 
- Click the "Find" icon to select the employee.
- Fill in contract details:
 - Contract Date
 - Start Date
 - End Date
 - Compensation Amount
 - Contract Status (create first if needed)
 - Contract Number
 - Contract Shift
 - Remark (optional)
- If applicable, check "Use Employers or Witness" and add those details.
- Click "Save."

3. Import Contract Employees (Excel Template):

- Click "Download Template" .
- Open the template and fill in mandatory fields (red headers).
- Click "Import Excel" .
- Browse and select the completed Excel file.
- Click "Validate" to check for errors.
- If valid, click "Import."

4. Find Contract Employee List:

- Select a period in the "Period" box.
- Choose employees by organization structure or filter by employee.
- Apply additional filters as needed (e.g., contract type).

- Click "Preview" to view results.
- Click "Export Excel"  to download data.

5. Create Contract Status Options (if needed):

- Click the setup icon.
- Write the contract status name.
- Click "Save."

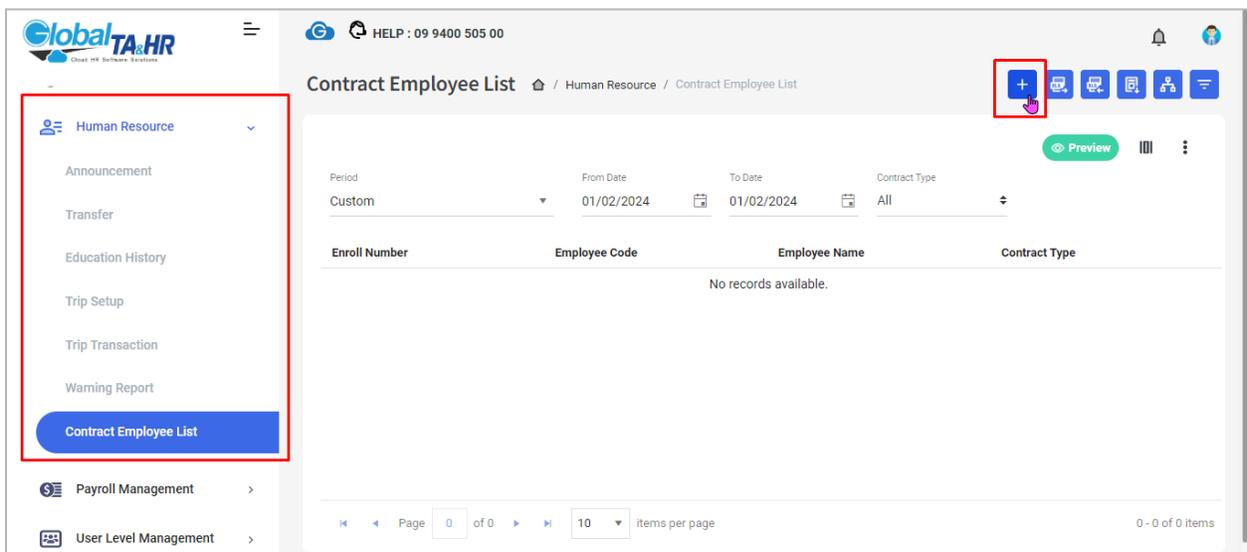
Key Points:

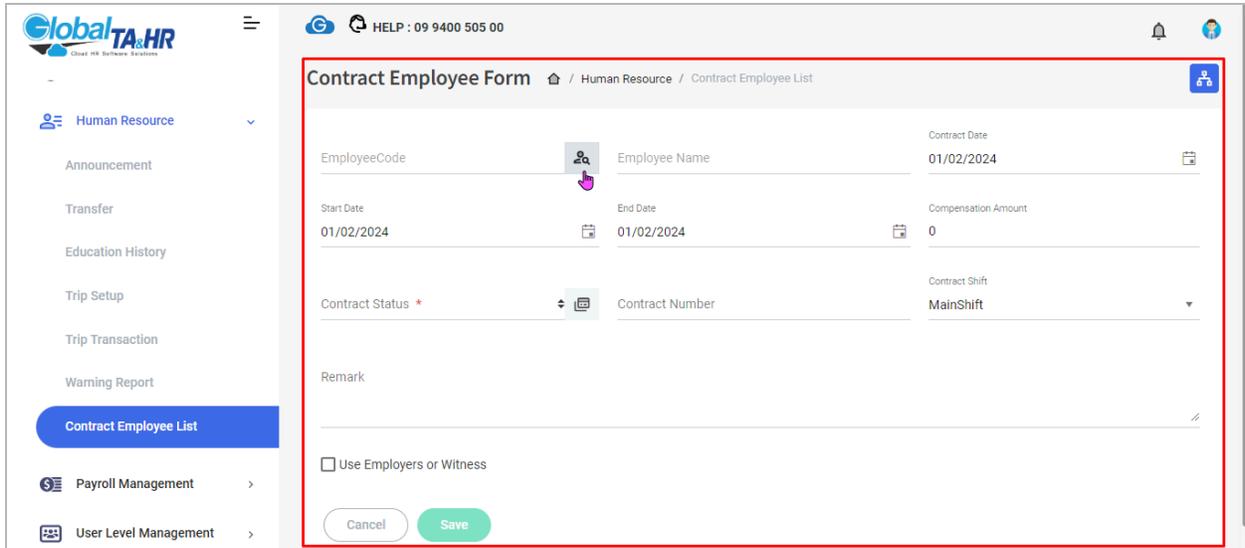
- Ensure all mandatory fields are filled in the template before importing.
- Use the "Use Employers or Witness" option based on contractual needs.
- Always validate data to catch errors before importing.
- Utilize filters to refine search results.

Additional Information:

- Contract status options must be created before use.
- The "Contract Shift" field specifies the assigned shift during the contract period.
- The "Remark" field allows for additional notes or comments.

Screenshots:





Feature: Education History

Purpose:

- Stores educational information about employees for reference and analysis.
- Tracks degrees, fields of study, institutions, dates, and achievements.

Key Points:

Add New Education History:

- Enter employee details (degree, field of study, university, start/end dates, GPA, award date, graduation status, remarks).

View and Edit Existing Records:

- Access and modify existing education information as needed.

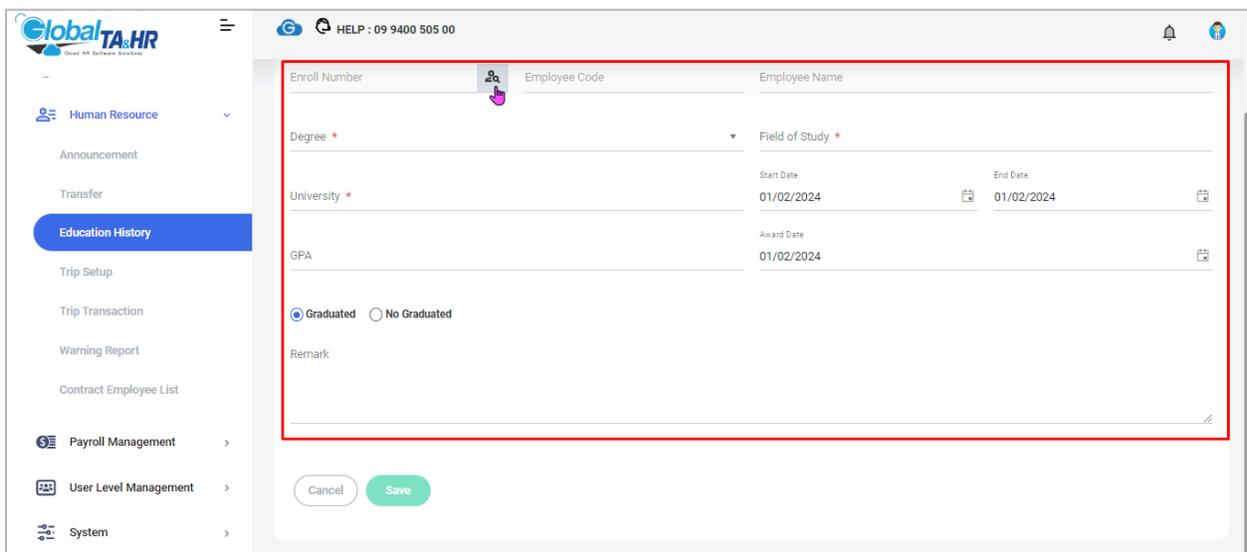
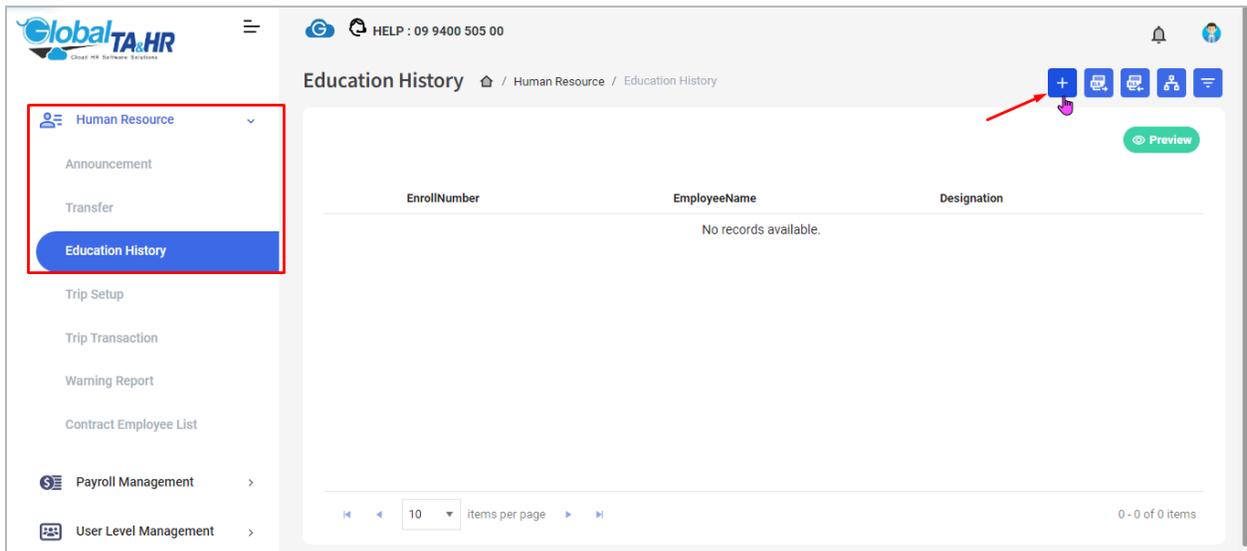
Key Points:

- All mandatory fields must be filled before saving.
- Multiple education records can be added for each employee.
- The feature provides a comprehensive overview of employees' educational backgrounds.

Additional Information:

- The "GPA" field captures grade point averages.
- The "Award Date" specifies when a degree or certificate was conferred.
- The "Remarks" field allows for additional notes or comments.

Screenshots:



Feature: Transfer

Purpose:

- The Transfer feature in Global TA & HR Cloud allows you to manage employee reassignments within your organization efficiently. Whether it's a change in department, location, title, or even company, you can easily record and track transfers.

Key Points:

- Individual or Bulk Transfers: Manage transfers for single employees or import data for multiple transfers using an Excel template.
- Detailed Tracking: Record essential information like order date, effective date, transfer type (internal, external, temporary), new company/department, and remarks.
- Flexible Data Management: Choose specific data points to update during the transfer process through the "Choosing Columns" option.
- Easy Reporting: Generate Excel reports based on selected timeframes and employees to analyze transfer trends or retrieve specific data.

Step-by-Step Guide:

1. Single Employee Transfer:

- Go to Left Menu Panel > Human Resource > Transfer.
- Click "+ Add New" .
- Choose the employee using Filter by Employee or Organization Structure.
- Click Preview to confirm the employee selection.
- Fill in the transfer details:
 - Order Date: Date the transfer is initiated/approved.
 - Effective Date: Date the transfer takes effect.
 - Status: Internal (within department/business), External (to another company), or Temporary (duration defined in Change Status).
 - Change Status: Create and choose a "Change Status" name specific to this transfer type.
 - Company and Department: Select the new company and department (default values can be changed through "Choosing Columns").
 - Choosing Columns: Check additional data points like division, location, section, designation, group, or cost center you want to change.
 - Remark: (Optional) Add any relevant notes about the transfer.
- Click Save to complete the single-employee transfer.

2. Multi-Employee Transfer (Excel Import):

- Follow steps 1-2 from the single employee transfer.
- Click the “Download Template” icon  to download the Transfer Excel Template.
- Fill in the template with transfer data for multiple employees, ensuring mandatory columns like Enroll Number, Employee Code, Employee Name, Order Date, Effective Date, Status, Change Status, Old Company, and New Company are complete.
- Click the “Import Excel” icon .
- Browse and select the completed Excel file.
- Click Validate Data to check for errors.
- Once validated, click Import to complete the bulk transfer.

3. Exporting Transfer Data:

- Go to Left Menu Panel > Human Resource > Transfer.
- Choose a Period for the report.
- Select the staff using Filter by Employee or Organization Structure.
- Click Preview to see the filtered employee list.
- Click “Export Excel”  to download the data in an Excel report format.

Additional Tips:

- Review the transfer process steps before moving employees.
- Ensure all mandatory fields are filled correctly during individual or bulk transfers.
- Utilize the "Choosing Columns" option to update specific data points for each transfer efficiently.
- The Transfer feature helps maintain accurate employee records and simplifies employee movement within your organization.

Screenshots:

GlobalTA&HR HELP : 09 9400 505 00

Transferred Employee List / Human Resource / Transfer

Human Resource

- Announcement
- Transfer**
- Education History
- Trip Setup
- Trip Transaction
- Warning Report
- Contract Employee List
- Payroll Management
- User Level Management
- System

Period: Custom From Date: 01/02/2024 To Date: 01/02/2024 Transfer Type: All

Action	Enroll Number	Employee Code	Employee Name	Company	Department	Status	Transfer Type
No records available.							

Page 0 of 0 10 items per page 0 - 0 of 0 items

GlobalTA&HR HELP : 09 9400 505 00

Add Transfer Employee / Human Resource / Transfer

Human Resource

- Announcement
- Transfer**
- Education History
- Trip Setup
- Trip Transaction
- Warning Report
- Contract Employee List
- Payroll Management
- User Level Management
- System
- Report
- Claim

Customer Information

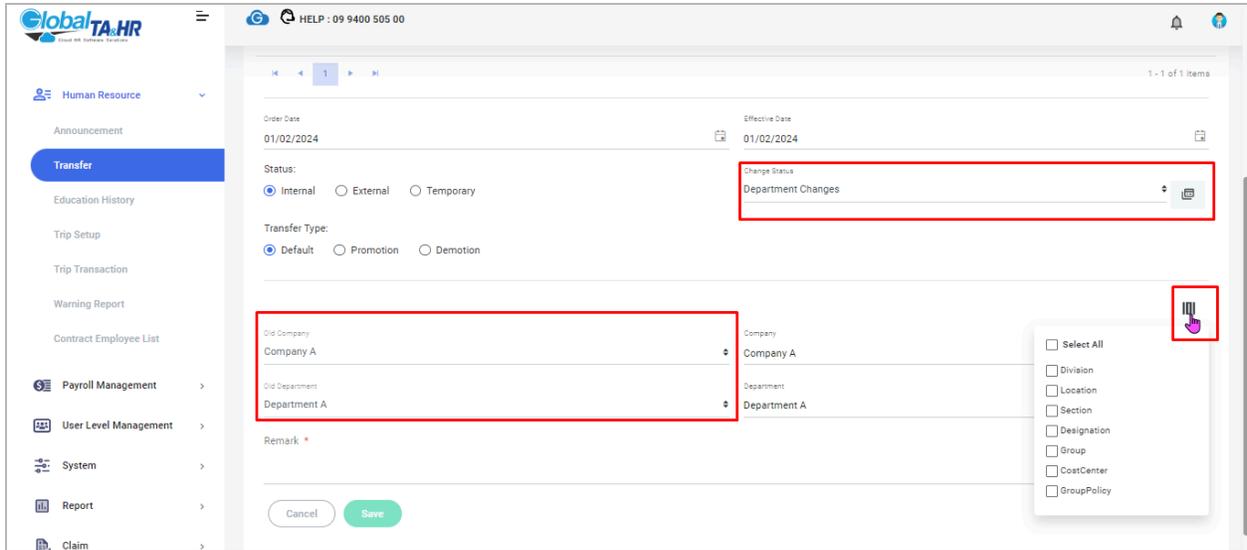
Employee Name : Staff A1 - 30003
Department : Department A

Order Date: 01/02/2024 Effective Date: 01/02/2024

Status: Internal External Temporary

Transfer Type: Default Promotion Demotion

Change Status: Department Changes



Feature: Trip Setup

Purpose:

- Global TA & HR Cloud allows you to define business travel routes for drivers and manage related transactions seamlessly. This improves route planning, driver allocation, and expense tracking.

Key Points:

- Trip Setup: Create and store predefined travel routes with details like start/end points, car information, and notes.
- Trip Transaction: Record individual trips based on a chosen route, specifying date, driver, expenses, and remarks.
- Simplified Management: Organize routes, track vehicle usage, and monitor driver activity for efficient fleet operations.

Step-by-Step Guide:

1. Trip Setup:

- Access: Left Menu Panel > Human Resource > Trip Setup

Click Add New  :

- Trip Name & Short Code: Define a descriptive name and short code for the route.
- Way From & Way To: Click the "Add" icon to specify the start and end points for the route.
- Car No & Wheel: Click the "Add" icon to define the car assigned to the route and its number of wheels.
- Remark: (Optional) Add any relevant notes about the route.
- Save: Click "Save" to store the new trip setup.

2. Trip Transaction:

- Access: Left Menu Panel > Human Resource > Trip Transaction

Click Add New  :

- Trip Name: Click the "Choose" icon and select a pre-defined route from Trip Setup.
- Trip Date: Specify the date for the specific trip.
- Driver & Assistant Driver: Click the "Choose" icon to select the driver and optional assistant driver for the trip.
- Price: (Optional) Enter any associated travel expenses, like fuel costs or tolls.
- Remark: (Optional) Add any notes about the trip.
- Save: Click "Save" to record the trip transaction.

Additional Tips:

- Utilize predefined routes in Trip Setup to avoid repetitive data entry during transactions.
- Track driver activity and vehicle usage by analyzing trip transactions.
- Monitor travel expenses by filtering transactions based on specific routes or timeframes.
- Use the "Remark" field in both setup and transactions for additional information.

Screenshots:

GlobalTA&HR HELP : 09 9400 505 00

Trip Setup Human Resource / Trip Setup

TripName	ShortCode	Way From	Way To	CarNo	Wheel	Remark	Action
YGN To MDY for Items transport(1)	Item(1)	Yangon,Thingangyun	Mandalay,ChanMye...	FF/022323	6	-Testdrive	 

Page 1 of 1 10 Items per page 1 - 1 of 1 items

Human Resource

- Announcement
- Transfer
- Education History
- Trip Setup**
- Trip Transaction
- Warning Report
- Contract Employee List

Payroll Management

- User Level Management
- System
- Report

GlobalTA&HR HELP : 09 9400 505 00

Trip Setup Human Resource / Trip Setup

Trip Name:

Short Code:

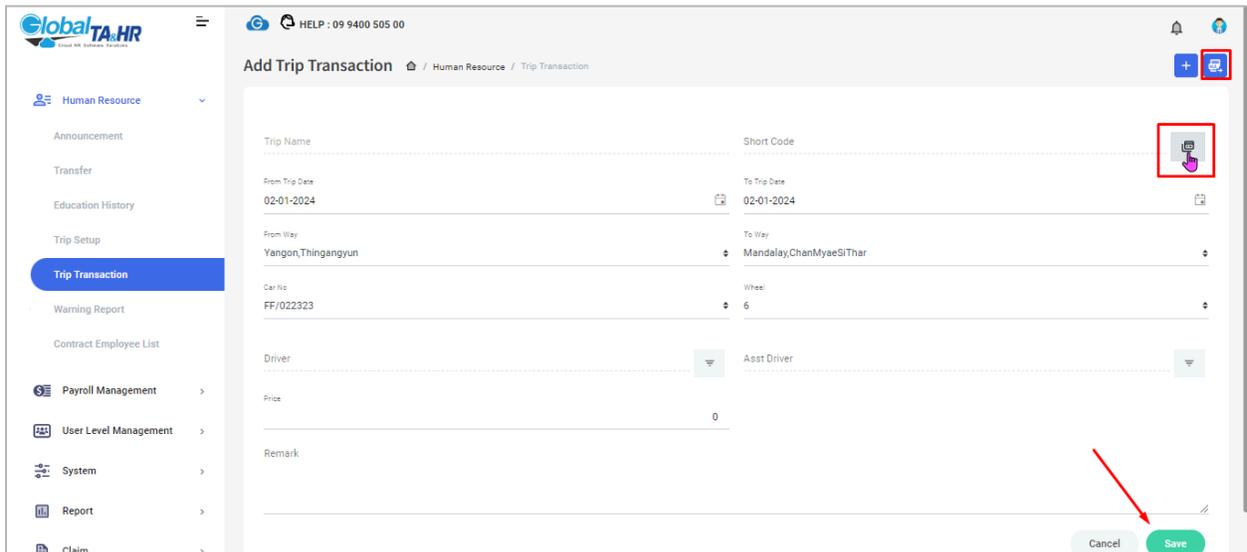
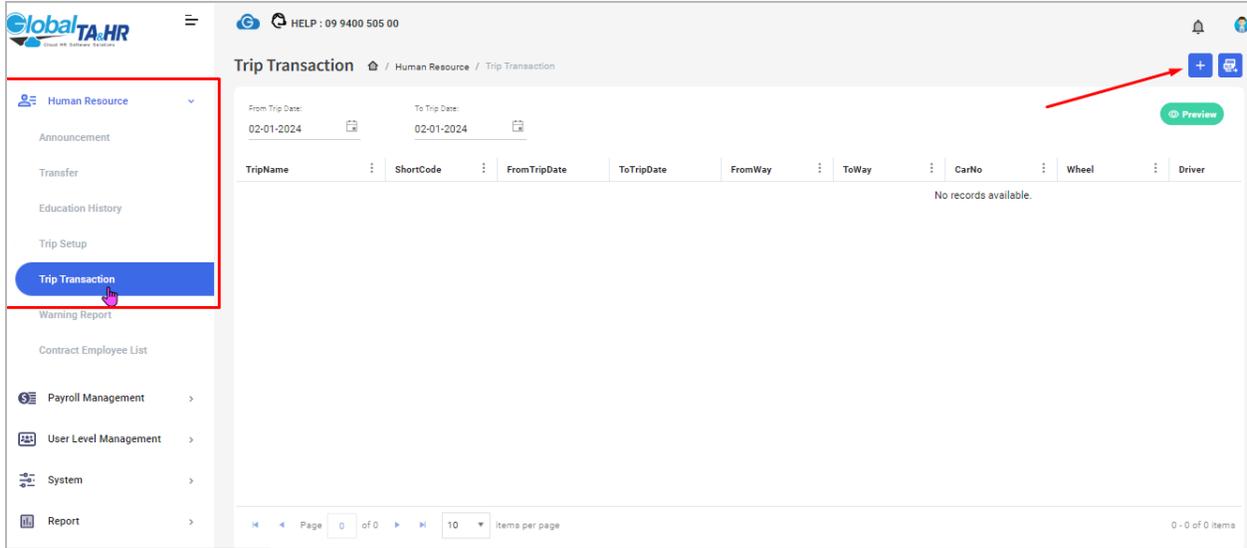
Way From:

Way To:

Car No:

Wheel:

Remark:



Feature: Warning Report

Purpose:

- Records and tracks disciplinary information about employees for performance or behavior-related concerns.
- Provides a centralized repository for warning history, aiding in decision-making and employee development.

Key Points:

- Essential for documenting workplace issues and interventions.
- Offers a structured approach to managing employee warnings.
- Facilitates data-driven decisions for addressing performance or conduct concerns.

Steps:

1. Creating a New Warning Report:

- Access: Left Menu Panel > Human Resource > Warning Report
- Click "Add New." 
- Find Employee: Click the "Find" icon and select the employee.
- Fill in Warning Details:
 - Warning Date
 - Warning Status (create first if needed)
 - Warning Level (create first if needed)
 - Warning Description
 - Remark (optional)
- Click "Save."

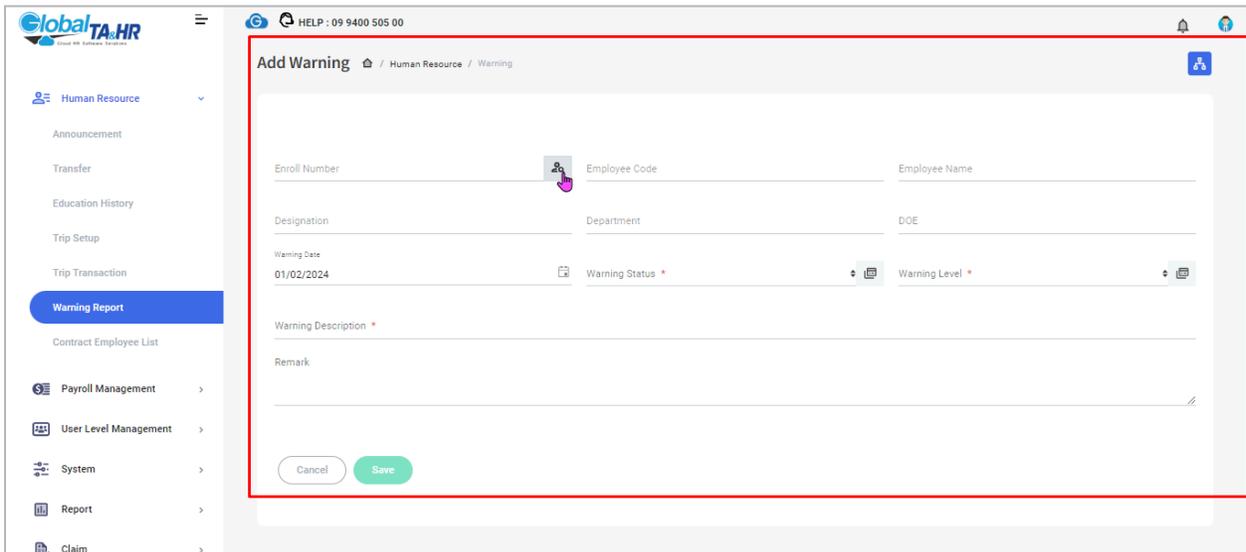
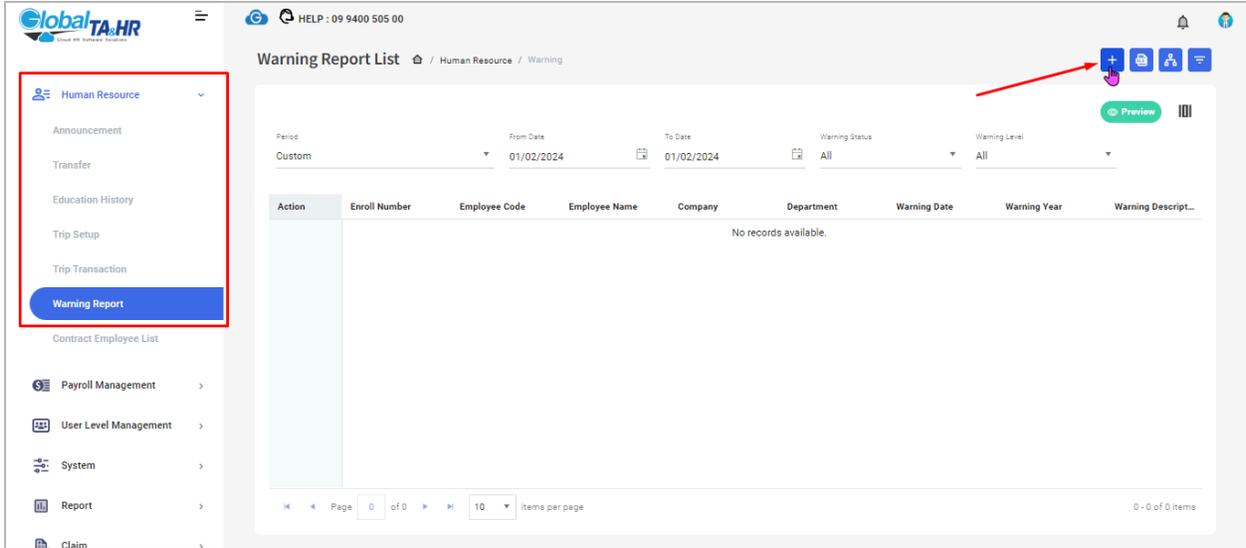
2. Finding Existing Warning Reports:

- Choose a Period in the "Period" box.
- Select Employee: Filter by employee or use the organization structure.
- Click "Preview" to view the filtered reports.
- Apply Filters: Refine results by Warning Status and/or Warning Level.
- Click "Export Excel"  to download data.

Additional Tips:

- Ensure all necessary details are accurate and complete.
- Use filters to efficiently locate specific reports.
- Utilize warning reports to guide performance improvement plans or disciplinary actions.

Screenshots:



Feature: Employee Document

Purpose:

- This guide explains how to store and manage employee documents within Global TA Cloud, allowing you to securely archive important information related to your workforce.

Key Points:

- Global TA Cloud offers a dedicated section for storing employee documents.
- You can upload various document types, including contracts, resumes, certificates, and ID cards.
- Documents are stored securely in cloud storage (currently Google Drive).
- Configure storage settings before using the employee document feature.

Step-by-Step Instructions:

1. Accessing Employee Documents:

- Log in to Global TA Cloud web software.
- Go to System in the left menu panel.
- Click System Setting.
- Ensure the Storage Setting is configured with the necessary information (currently Google Drive).

2. Uploading Documents:

- Go to Human Resource in the left menu panel.
- Click Employee Document.
- Click “Add New” 
- Use the Find icon  to select the desired employee.
- Enter the File Name and Description of the document.
- Click Browse to locate the file on your computer.
- Click Save to upload the document to cloud storage.

3. Additional Notes:

- You can manage uploaded documents later by accessing the same menu and searching for the employee.
- Remember to follow your organization's data security practices for sensitive documents.

Screenshots:

The screenshot shows the 'Employee Document' page in the Global TA&HR system. The left sidebar contains a navigation menu with 'Employee Document' highlighted in blue. The main content area displays a table with the following columns: EnrollNumber, EmployeeCode, EmployeeName, Department, Designation, FileName, Description, and Download File. The table is currently empty, showing 'No records available.' A 'Preview' button is located in the top right corner of the table area. The breadcrumb navigation at the top reads 'Human Resource / Employee Document'. At the bottom of the page, there is a pagination control showing '10 items per page' and '0 - 0 of 0 items'.

The screenshot shows the 'Employee Document' form in the Global TA&HR system. The left sidebar is the same as in the previous screenshot, with 'Employee Document' highlighted. The main content area contains a form with the following fields: 'Select Employee Name' (with a dropdown arrow), 'FileName', and 'Description'. Below these fields is a 'Browse File' button. At the bottom of the form are 'Cancel' and 'Save' buttons. The breadcrumb navigation at the top reads 'Human Resource / Employee Document'. A red box highlights the entire form area.

5. Module: Payroll

Feature: Claim

Purpose:

- Claim: Request reimbursement for work-related expenses.
- Leave from OT: Claim replacement leave days for overtime worked.

Key Points:

- Customizable Claim Names: Define different claim categories (e.g., travel, transport, mobile) and manage them by user role.
- User Permissions: Control which users can submit claims and approve them through User Level settings.
- Mobile App Submission: Employees easily submit claims with photos and descriptions through the mobile app.
- Leave from OT: Claim replacement leave for overtime days worked on holidays.
- Approvals and Reports: Managers review and approve claims on mobile or web, and access detailed reports.

Steps:

1. Setting Up Claims (for HR/System Admin):

Claim Names:

- Open Global TA Cloud Web URL.
- Go to Master Menu > Label Setup.
- Click "Add New"  and define claim names and descriptions.
- Set "Label Type" to "Claim."
- Click "Save."

User Permissions:

- Go to User Level Management > User Level Control.
- Find user levels (e.g., employee, supervisor, manager) and click Access Permission.

- Grant appropriate Claim menu permissions (e.g., ClaimRequest, ClaimApprove, Claim Report) based on user level.
- For "Approver/Final Approver" settings, refer to <https://www.globalta.com.mm/support/approver/>

2. Submitting Claims (Employee):

- Open Global TA Cloud Mobile App.
- Go to "More Settings"  > Claim Request.
- Click "Add" and choose a claim category.
- Select the claim date, value, and reason.
- Attach photos (optional) and click "Send."

3. Leave from OT Claims:

- Follow the steps for submitting claims (above).
- In the Overtime Request Form, check the "Use as Substitute Leave" option for overtime worked on holidays.
- If the option isn't available, log out and log back in, or contact HR or Global TA Cloud Operator Service.

4. Approving Claims (Manager):

Mobile App:

- Go to "More Settings"  > Claim Approve.
- Check claim requests under the "Pending" tab.
- Click on a request, review details, and click "Approve" or "Reject."
- Web Browser:
- Go to Claim Menu > Claim Approve.
- Choose period, request type, label, and filtering options.
- Click "Preview" to see claims.
- Click "Approve," "Reject," "View Detail," or "Delete" under the Action column.

5. Claim Reports (for HR/Manager):

- Open Global TA Cloud Web URL.
- Go to Claim Menu > Claim Report.
- Choose period, request type, label, and filtering options.
- Select a custom template or choose "Choosing Columns" to customize the report.
- Click "Preview" to see the report.

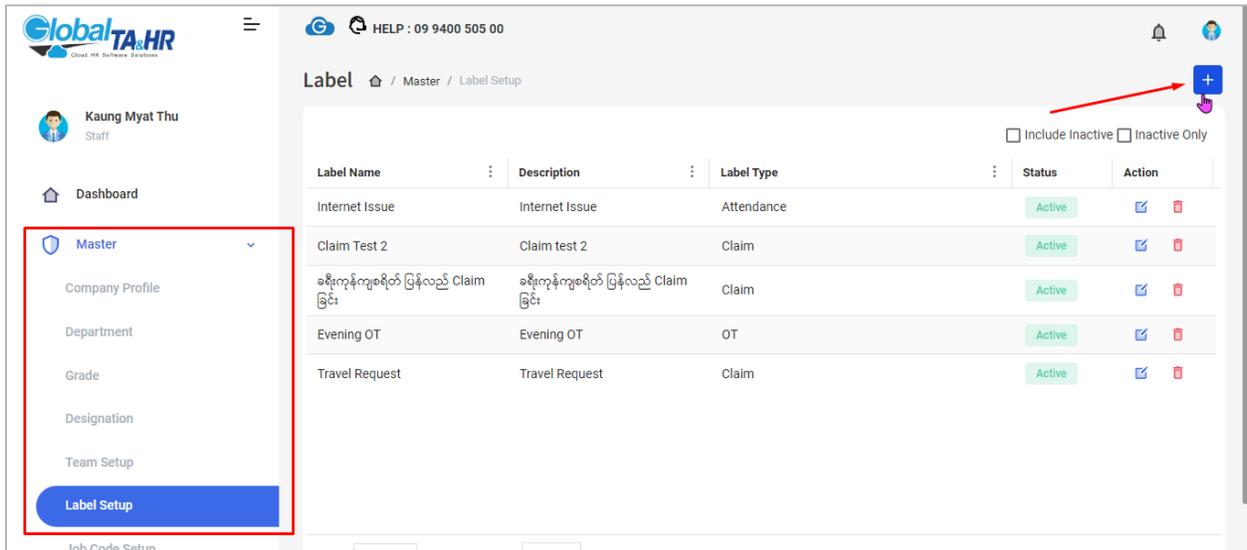
Tips:

- For Leave from OT balance details, click "Balance Detail View" in Claim Report.
- To set claim expiry days, go to System > System Setting > Application Option > General > Claim Restricted Days.

Additional Resources:

- Approver settings: <https://www.globalta.com.mm/support/approver/>
- Global TA Cloud Operator Service: Mobile App > "More Settings" > Chatwoot

Screenshots:



Global TA&HR Cloud HR Software Solutions

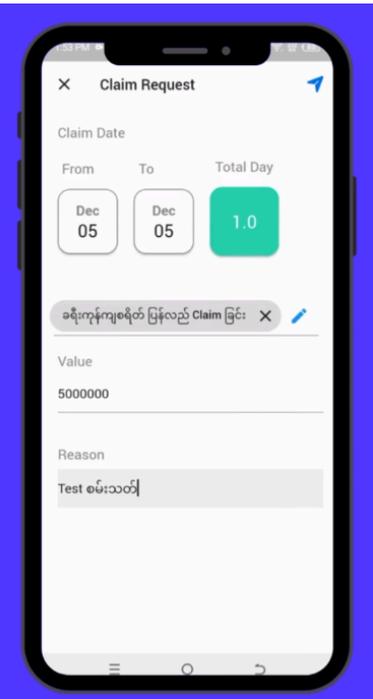
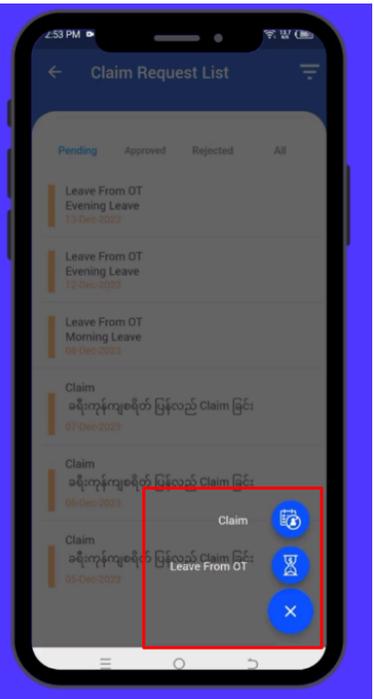
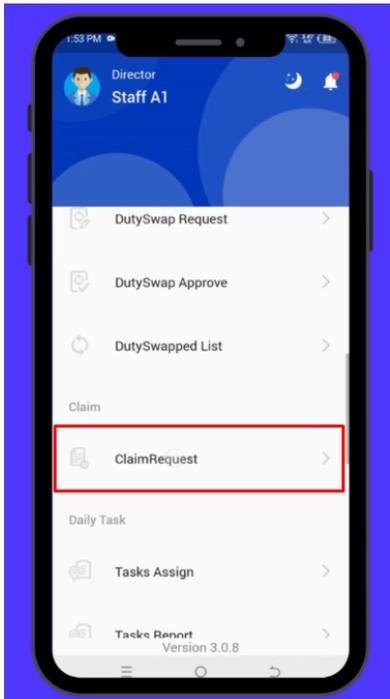
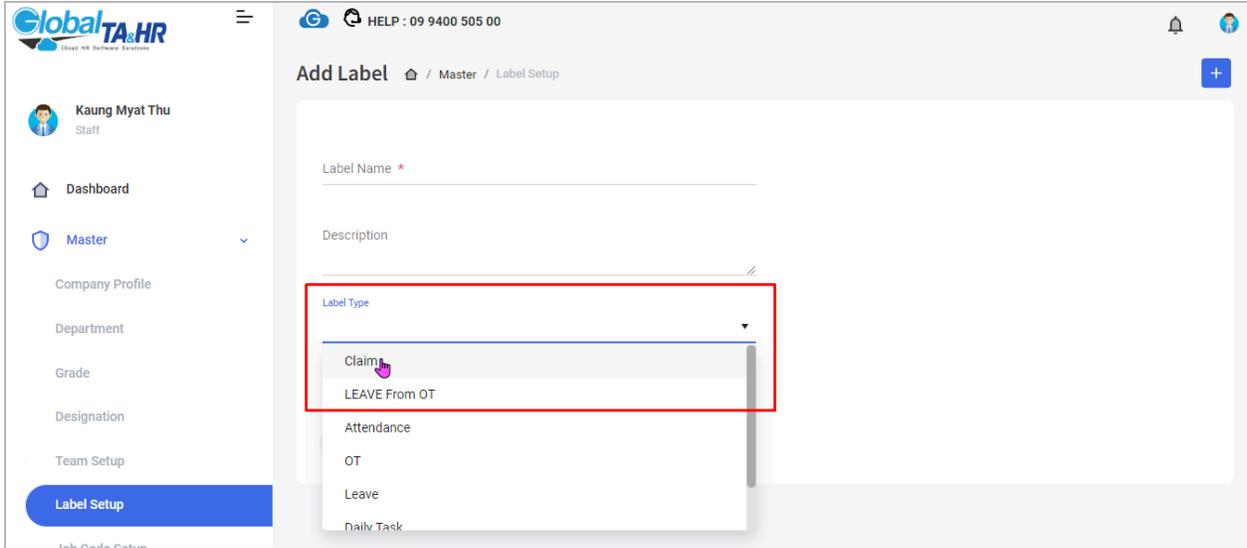
HELP : 09 9400 505 00

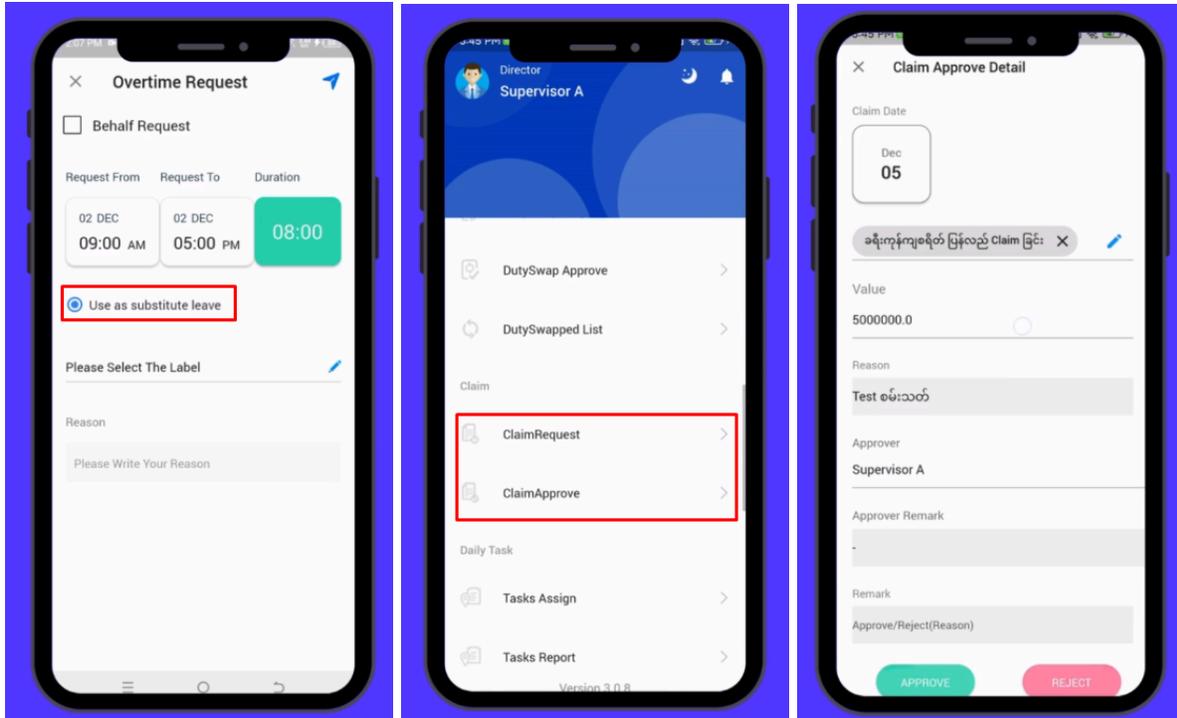
Label / Master / Label Setup

Include Inactive Inactive Only

Label Name	Description	Label Type	Status	Action
Internet Issue	Internet Issue	Attendance	Active	[Edit] [Delete]
Claim Test 2	Claim test 2	Claim	Active	[Edit] [Delete]
ခရီးကုန်ကျစရိတ် ပြန်လည် ဖြင့်	ခရီးကုန်ကျစရိတ် ပြန်လည် ဖြင့်	Claim	Active	[Edit] [Delete]
Evening OT	Evening OT	OT	Active	[Edit] [Delete]
Travel Request	Travel Request	Claim	Active	[Edit] [Delete]

Job Code Setup





Feature: Payment Title

Purpose:

- Define and manage named benefits received by employees in their monthly salary.
- Categorize benefits as additions, allowances, or awards/deductions.
- Control which benefits are displayed in the payment calculation form.

Key Points:

- Each Payment Title has a description and is categorized by payment type (addition, allowance, award/deduction).
- Inactive titles can be hidden.
- Additions and Allowances are recurring, while Awards/Deductions can be set for specific periods.
- Connecting Payment Titles to Payroll Rules is required for them to appear in payment calculations.

Steps:

1. Accessing Payment Titles:

- Go to Left Menu Panel > Master (scroll down) > Click "Payment Title."

2. Creating Payment Titles:

2.1 Addition:

- Click "Add New." 
- Enter a descriptive name in "Description."
- Choose "Addition" in "Payment Method."
- Select "Payment" or "Deduction" based on the effect on salary.
- Click "Save."

2.2 Allowance:

- Follow steps 1-3 for Addition, choosing "Allowance" in "Payment Method."

2.3 Award & Deduction:

- Follow steps 1-3 for Addition, choosing "Award and Deduction" in "Payment Method."
- Set the period for the award or deduction (monthly, every 2-3 months).

3. Connecting to Payroll Rules:

Addition:

- A new column appears under "Addition" and "Deduction" in Payroll Management.
- Create a Payroll Rule with the name of the built-in Payment Rule.
- Select the rule and choose "Formula" then "Check Error" and "Update."

Allowance:

- A new column appears in "Payment Definition" under Payroll Management.
- Contact the Global TA & HR Rule Team to set up the pay policy.

Award & Deduction:

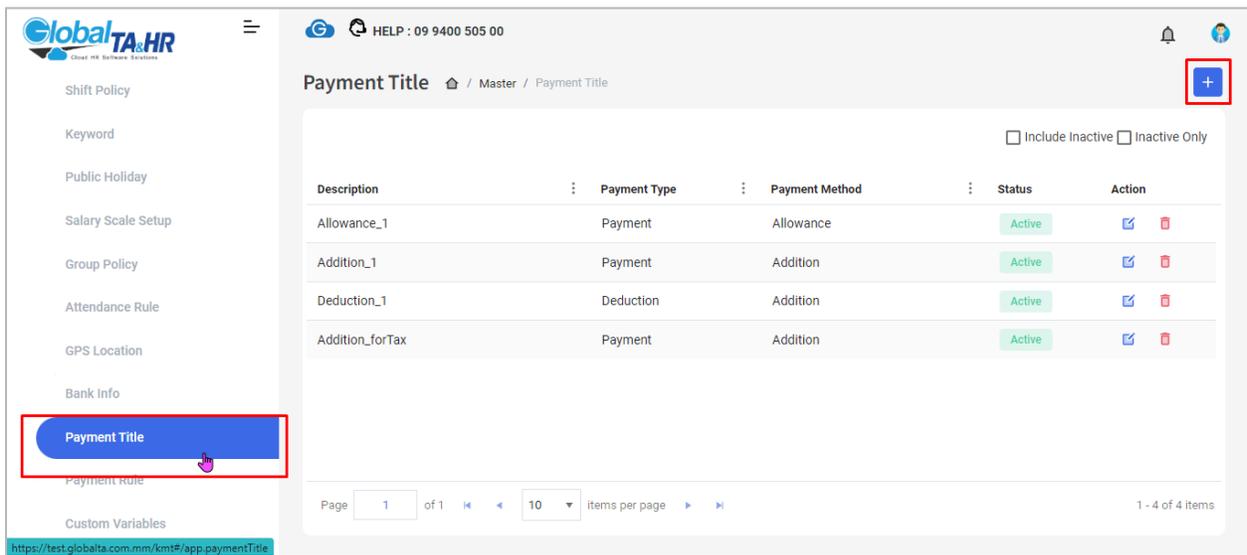
- A new Payment Title appears under "Award and Deduction" in Payroll Management.

- Connect the rule and policy for calculation in payment calculations.

Tips:

- Inactive titles can be hidden by checking the box under "Inactive Payment Title."
- Contact the Rule Team if you need to use Allowance or Award & Deduction.
- Remember that Payment Titles alone don't affect payroll calculations; they need to be connected to Payroll Rules.

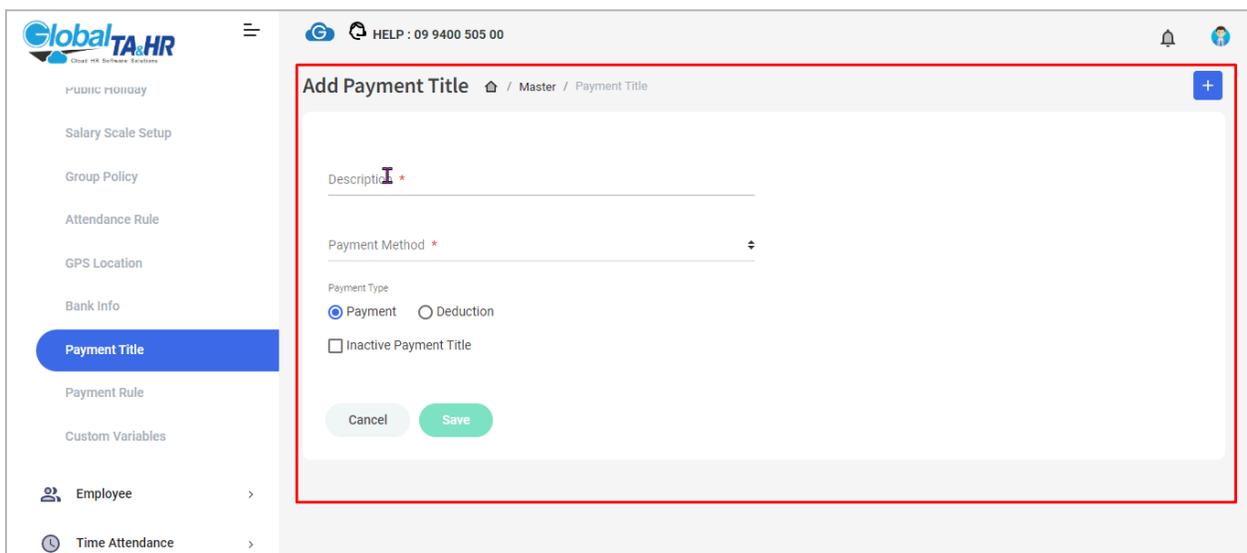
Screenshots:



The screenshot shows the 'Payment Title' management page. The left sidebar contains a menu with 'Payment Title' highlighted. The main content area displays a table with the following data:

Description	Payment Type	Payment Method	Status	Action
Allowance_1	Payment	Allowance	Active	[Edit] [Delete]
Addition_1	Payment	Addition	Active	[Edit] [Delete]
Deduction_1	Deduction	Addition	Active	[Edit] [Delete]
Addition_forTax	Payment	Addition	Active	[Edit] [Delete]

At the top right of the table area, there are checkboxes for 'Include Inactive' and 'Inactive Only'. A red box highlights a '+' button in the top right corner of the main content area.



The screenshot shows the 'Add Payment Title' form. The left sidebar is visible with 'Payment Title' highlighted. The main content area contains the following form fields:

- Description ***: A text input field.
- Payment Method ***: A dropdown menu.
- Payment Type**: Radio buttons for 'Payment' (selected) and 'Deduction'.
- Inactive Payment Title**: A checkbox.

At the bottom of the form, there are 'Cancel' and 'Save' buttons. A red box highlights the entire form area.

Feature: Payroll Management

Purpose:

- This guide explains how to manage payroll processes in Global TA Cloud, including pre-payroll setup, actual calculation, and post-payroll reporting.
- To provide secure and convenient options for delivering payslips to employees
- To maintain a record of payment calculations and comments

Key Points:

- Pre-payroll: Define rules for salary calculations (attendance, leave, overtime, etc.), gather employee data (salary, allowances, bonuses), and adjust salaries (loans, advances, savings).
- Actual calculation: Run payroll calculations for a chosen period and approve calculated payments.
- Post-payroll: Generate reports on salaries, taxes, and other payroll-related data.

Menus:

Pre-Payroll Process:

- Master Menu:
 - Job Code Setup, Payment Title, Payment Rule, Payment Definition, Addition & Deduction, Award & Deduction, Salary Adjustment (Loan, Advance, Savings)
- Payroll Management:
 - Addition & Deduction, Award & Deduction, Salary Adjustment (Loan, Advance, Savings)

Actual Payroll Calculation & Approve Process:

- Payroll Management: Payment Calculation, Payment Approve, Finish Job Code by Employee

Post-Payroll Process:

Report Menu:

- Payment Comparison, Monthly Payment Report, SSB Contribution Report, Quarterly Tax Report, Tax Summary Report, Personal Income Tax IRD 16 Reports

Steps:

1. Pre-Payroll Process:

1.1 Job Code Setup (Master Menu > Job Code Setup):

- Define job codes with descriptions and per-amount salaries.

1.2 Payment Title (Master Menu > Payment Title):

- Create named benefits (additions, allowances, awards/deductions) with payment methods (payment or deduction).

1.3 Payment Rule (Master Menu > Payment Rule):

- Define formulas for calculating various benefits based on chosen payment type.

1.4 Payment Definition:

1.4.1 Direct Data Input (Payroll Management > Payment Definition):

- Choose employees and enter salary and allowance amounts.

1.4.2 Excel Import (Payroll Management > Payment Definition):

- “Export Excel”  , fill in data, and import.

1.5 Addition & Deduction:

1.5.1 Direct Data Input (Payroll Management > Addition & Deduction):

- Choose employees and enter addition/deduction amounts.

1.5.2 Excel Import (Payroll Management > Addition & Deduction):

- “Download template with Date Range”  or “Export Excel”  , fill in data, and import.

1.6 Award & Deduction:

1.6.1 Direct Data Input (Payroll Management > Award & Deduction):

- Choose employees, date, and award/deduction type, then enter amount and set payment/deduction.

1.6.2 Excel Import (Payroll Management > Award & Deduction):

- “Download template” , fill in data, and import.

1.7 Salary Adjustment (Payroll Management > Salary Adjustment):

1.7.1 Direct Data Input:

- Choose employees, date, and adjustment type (increase/decrease), then enter the amount and set the adjustment title.

1.7.2 Excel Import:

- “Download template” , fill in the data, and import.

1.8 Loan, Advanced, and Saving (Payroll Management > Loan, Advanced, and Saving):

- Choose employees, transaction date, amount, and loan/advance/saving type. Set repayment plan and start date.

2. Actual Payroll Calculation & Payslip & Approve Process:

2.1 Payment Calculation (Payroll Management > Payment Calculation):

- Choose period and employees, then click "Calculate."

2.1.1 After Payment Calculation:

- Available after payment calculation is approved

Options for sending payslips: mobile, email, print

- HR or system administrator can set payslip passwords for mobile delivery
- Payment records can be locked for security
- Comments can be added to individual or all payment records

Step-by-Step Instructions:

1. Retrieve or Calculate Payment Calculation:
 - Navigate to Payroll Management > Payment Calculation
2. Choose the relevant period
 - Retrieve the approved payment calculation or calculate it if not already done

Access Additional Options:

- Click the "additional option icon"  within the Payment Calculation Form

Choose Payslip Delivery Method:

Select one or more options:

- Email Payslip
- Send to Mobile (password-protected)
- Print Payslip

Set Payslip Password (if applicable):

- HR or system administrator can set passwords for mobile payslips:
 - Go to Employee > Employee Setup > Set Payslip Password
 - Provide initial passwords to employees (they'll change them upon first use)

Lock Payment Record (optional):

- Follow Step 1- 2, Click "Lock icon"  for added security, lock the payment record

View and Comment on Payment Records:

Access Record & Set Comment to:

- Follow Step 1- 2, Click "Payment Record icon"  for view individual payment records
- Follow Step 1- 2, Click "Add Comment icon"  for add comments to individual or all records

2.2 Payment Approve (Payroll Management > Payment Approve):

2.2.1 For Payment Approved:

- Choose period and employees, then click "Retrieve" or "Send Approve." Go to "Payment Approve" again, choose period and employees, and click "Preview." Approve or reject payments.
- Choose period and employees, then click "Preview." Approve or reject payments.

2.3 Finish Job Code by Employee (Payroll Management > Finish Job Code by Employee):

- Choose period and employees, select job code, click "Preview," and enter finish quantity. Save data.

3. Post-Payroll Process:

- Generate various reports from the Report Menu based on your needs.

Benefits of Payroll Software:

- Saves time and improves efficiency.
- Ensures accuracy in calculations and reduces errors.
- Expands to accommodate growing businesses.
- Facilitates recordkeeping and reporting.

Additional Resources:

- Contact Global TA & HR Cloud Rule Team for assistance with rule setup and policies.
- Employees accessing mobile payslips will need to change their initial password upon first use.
- Consider locking payment records after all necessary actions are completed to ensure data integrity.
- Comments can be used to provide additional information or context for payment records.

Screenshots:

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Job Code / Master / Job Code Setup

Include Inactive
 Inactive Only

Job Code Name	Description	Price	Status	Action
No records available.				

[+](#)

[Master](#)

- Company Profile
- Department
- Grade
- Designation
- Team Setup
- Label Setup
- Job Code Setup**
- Leave Type
- Shift Policy

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Payment Title / Master / Payment Title

Include Inactive
 Inactive Only

Description	Payment Type	Payment Method	Status	Action
Allowance_1	Payment	Allowance	Active	✉ ✖
Addition_1	Payment	Addition	Active	✉ ✖
Deduction_1	Deduction	Addition	Active	✉ ✖
Addition_forTax	Payment	Addition	Active	✉ ✖

[+](#)

[Shift Policy](#)

- Keyword
- Public Holiday
- Salary Scale Setup
- Group Policy
- Attendance Rule
- GPS Location
- Bank Info
- Payment Title**
- Payment Rule
- Custom Variables

Page 1 of 1 10 items per page 1 - 4 of 4 items

<https://testglobalta.com/mm/km#/app-paymentTitle>

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Payment Rule / Master / Payment Rule

Payment Rule

Salary
OTRate
JoinResignDays
AbsentDays
ConfirmOTHours
JoinResignDeduction
LeaveDeduction
AbsentDeduction
OffdayHolidayOTHour
OTAmount
Addition_1

RULE INFORMATION FORMULA

Rule Order: 59

Rule Color: [Green] [Blue] [Purple] [Red] [Green] [More]

Payment Type: Payment

Rule Description

Payment Rule Type: Select Payment Rule Type

Rule Display Name *

Rule Display Order: 59

Rule Condition & Calculation

Include In Payslip Show Amount Zero Use Bank Payment Use Round Amount

GlobalTA&HR Cloud HR Software Solutions

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Employee Payment Definition Setup / Payroll Management / Employee Payment Definition Setup

Employee Payment Definition Setup

Save Preview

Enroll Number	Employee Code ↑	Employee Name	Department	Designation	Grade	DOE
No records available.						

Page 0 of 0 10 items per page 0 - 0 of 0 items

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Payment Addition and Deduction / Payroll Management / Payment Addition and Deduction

Period: Monthly January-2024

EnrollNumber	EmployeeCode	EmployeeName	Designation	Department	DOE	DOR
No records available.						

Page 0 of 0 10 items per page 0 - 0 of 0 items

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Award and Deduction / Payroll Management / Award and Deduction

Award and Deduction Date: 01/02/2024

EnrollNumber	EmployeeName	Department	Designation
No records available.			

Page 0 of 0 10 items per page 0 - 0 of 0 items

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Salary Adjustment / Payroll Management / Salary Adjustment

[Preview](#)

<input type="checkbox"/>	EnrollNumber	EmployeeName	Designation	BasicSalary	Allowance_1
No records available.					

Page 0 of 0 10 items per page 0 - 0 of 0 items

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Loan, Advanced and Saving / Payroll Management / Loan, Advanced and Saving

[Preview](#)

Transaction Date: 01/02/2024 Choose Type: All

<input type="checkbox"/>	EnrollNumber	EmployeeName	Designation	TotalLoanAmount	TotalLoanPayBackAmount	To
No records available.						

Page 0 of 0 10 items per page 0 - 0 of 0 items

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Payment Calculation / Payroll Management / Payment Calculation

Overwrite All OverWrite Overlap

Period: January-2024 From Date: 01/01/2024 To Date: 01/31/2024 Approve Type: All Payment Lock Stat.: All

Enroll Number	Employee Code	Employee Name	Department Order	Department	Main Dc

Page 0 of 0 10 items per page 0 - 0 of 0 Items

GlobalTA&HR HELP : 09 9400 505 00

Payment Calculation / Payroll Management / Payment Calculation

Overwrite All OverWrite Overlap

Period: December-2023 From Date: 12/01/2023 To Date: 12/31/2023 Approve Type: All Payment Lock Stat.: All

Enroll Number	Employee Code	Employee Name	Department Order	Department	Main Dc
101	101	test2	1	Admin	Admin
30001	A0001	HR A	100	Department A	Depart
30002	A0002	Supervisor A	100	Department A	Depart
30003	A0003	Staff A1	100	Department A	Depart
30004	A0004	Staff A2	100	Department A	Depart

Page 1 of 1 10 items per page 1 - 7 of 7 Items

Comment

Selected Employee Count : 10

Comment

Cancel Save

Enroll Number	Department	Main Department					
101	101	test2	1			Admin	Admin
30001	A0001	HR A	100			Department A	Department A
30002	A0002	Supervisor A	100			Department A	Department A
30003	A0003	Staff A1	100			Department A	Department A
30004	A0004	Staff A2	100			Department A	Department A

Payment Lock

Current Employee All Employee

December-2023

Password

Remark

Lock UnLock

Enroll Number	Department	Main Department					
101						Admin	Admin
30001						Department A	Department A
30002						Department A	Department A
30003						Department A	Department A
30004	A0004	Staff A2	100			Department A	Department A

Payment Records

PaymentMonth	PaymentFrom	PaymentTo	TransactionNo
Oct-2023	01-10-2023	31-10-2023	KMT20231031003
Nov-2023	01-11-2023	30-11-2023	KMT20231130009
Dec-2023	01-12-2023	31-12-2023	KMT20231231001

Page 1 of 1 | 40 items per page | 1 - 3 of 3 items

Buttons: Cancel, Select

Payment Calculation

Overwrite All | OverWrite Overlap

Period: January-2024 | From Date: 01/01/2024 | To Date: 01/31/2024

Approve Type: All, UnApproved, **Approved**, Rejected, Reject Calculated

Buttons: Calculate, Retrieve

Page 0 of 0 | 10 items per page | 0 - 0 of 0 items

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Payment Approve Payroll Management / Payment Approve

Human Resource

- Payroll Management
 - Addition & Deduction
 - Payment Definition
 - Payment Calculation
 - Salary Adjustment
 - Award and Deduction
 - Loan, Advanced and Saving
 - Payment Approve**

Period: January-2024 From Date: 01/01/2024 To Date: 01/31/2024 Approve Type: All

Preview Approve All

Action	EnrollNumber	EmployeeCode	EmployeeName	Department	Designation
No records available.					

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Finish Job Code by Employee Payroll Management / Finish Job Code by Employee

- Payment Calculation
- Salary Adjustment
- Award and Deduction
- Loan, Advanced and Saving
- Payment Approve
- Finish Job Code by Employee**
- User Level Management
- System
- Report
- Claim

Row View Column View Save Preview

Period: Custom From Date: 01/03/2024 To Date: 01/03/2024 Select Job Code:

Name	Finish Date	Job Code	Per Amount	Finish Quantity	Net Amount
No records available.					

