

**A QUICK GUIDE TO THE NEW AND
UPDATED FUNCTIONS AVAILABLE**

e@syFile™ EMPLOYER



CONTENTS

INTRODUCTION.....	1
1. NEW DATABASE ENCRYPTION AND DECRYPTION.....	1
2. DATABASE SPLIT BY PAYE REFERENCE NUMBER	1
3. NEW NOTIFICATION CENTRE	4
4. UPDATE TO THE INDIVIDUAL/BUNDLED INCOME TAX REGISTRATION (ITREG) PROCESS	8
5. CREATING, MERGING AND RESTORING OF DATABASES IN e@SYFILE™ EMPLOYER	9
5.1 CREATING A BACKUP OF YOUR DATABASE	9
5.2 MERGE MULTIPLE DATABASES	10
5.3 RESTORE DATABASE FROM A BACK-UP	13

INTRODUCTION

To assist employers, the following new and/or updated functions have been included in e@syFile™ Employer:

- New database encryption and decryption
- The ability to divide information, included in an existing database file, by Pay-As-You-Earn (PAYE) reference number
- A new notification centre (to replace the Inbox under Utilities)
- An update to the individual/bundled Income Tax Registration (ITREG) process
- Enhanced creating, merging and restoring of databases.

1. NEW DATABASE ENCRYPTION AND DECRYPTION

Information security is becoming more and more important as risks of fraud, due to unauthorised access to information and phishing which has become increasingly common.

Given the sensitive information stored, relating to employees and payroll data within e@syFile™ Employer, the South African Revenue Service (SARS) is introducing new security features to ensure the data is always protected and secure.

By incorporating industry-strength encryption and decryption standards, the latest e@syFile™ Employer update will ensure your database and backup files are encrypted with a unique key when not in use. What this means is, only users with valid e@syFile™ Employer login details, will be able to access the information.

Valid e@syFile™ Employer login details must be provided which will allow users to select the specific PAYE reference number for that session. The database will be unlocked through a decryption process, while the other linked PAYE reference numbers (database files) not in use, will remain secured. When logging off or closing the software, all database files will be encrypted for protection once again.

Knowing your e@syFile™ Employer login details is very important, as without these the database files cannot be accessed. This includes the administrator profile (ADMIN username), as well as the two user profiles setup during the first installation.

Note: Due to stringent security used, SARS will not be able to recover data where valid login details have been lost or forgotten; therefore it will not be possible to access encrypted data again.

e@syFile™ Employer login details will need to be provided when restoring or merging database backups. During these operations, users will be requested to provide the username and password that is applicable to the database backup being used.

It is vitally important to protect your e@syFile™ Employer login details, as the login details will be required whenever a database or backup file is opened, restored or merged.

2. DATABASE SPLIT BY PAYE REFERENCE NUMBER

Each user will have a master database file, and additional database files for each PAYE reference number or employer included in their current database. The split in data will enable users to manage their information per employer or PAYE reference number.

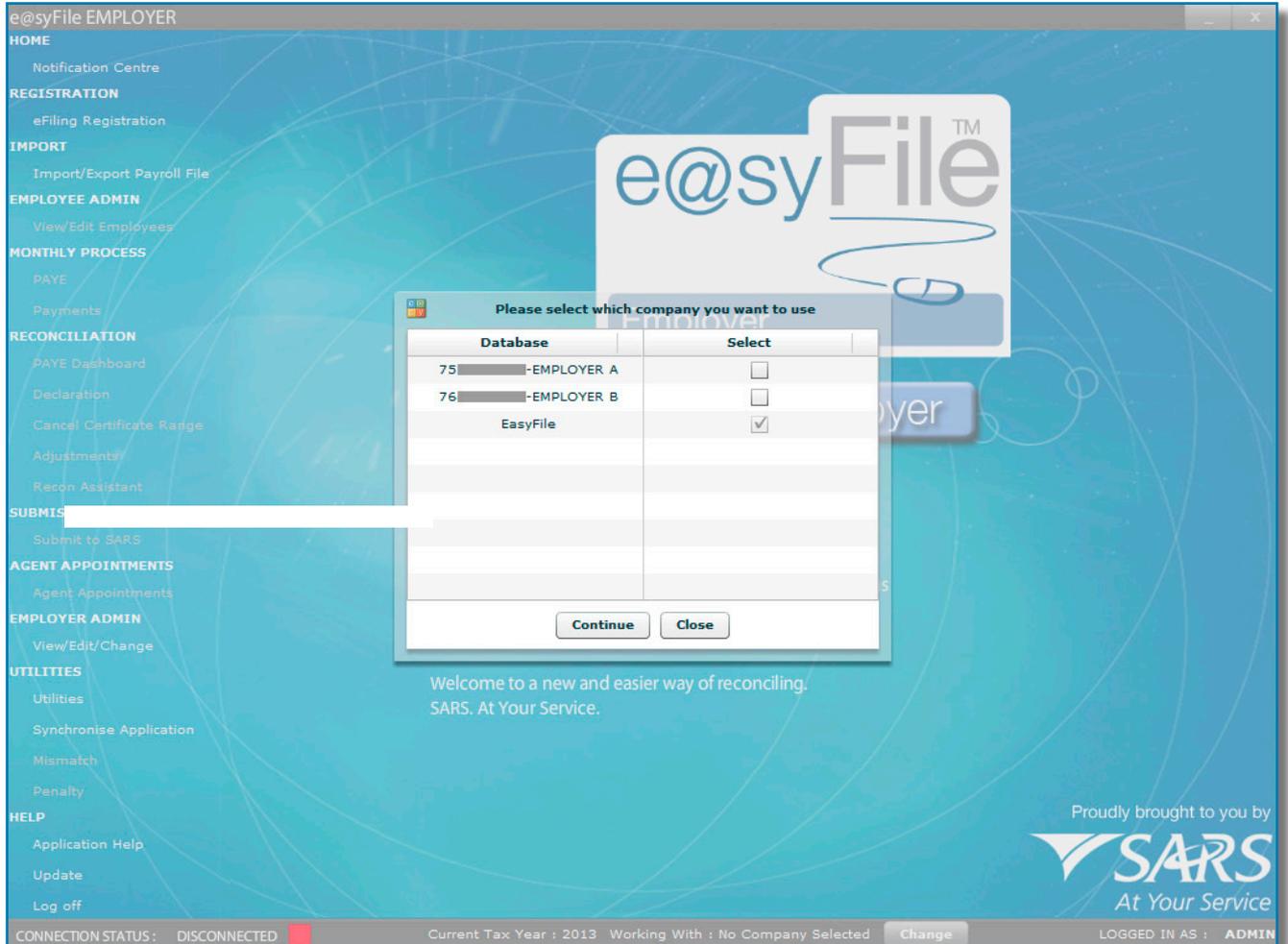
All correspondence received will be included in the master database file, and information relating to the Employer Reconciliation Declarations (EMP501s), Monthly Employer Declarations (EMP201s) and payments will be included in the individual employer database files.

These changes will have a minor effect on the navigation of existing functions within e@syFile™ Employer. Users will now select a specific employer or PAYE reference number to open the software and database file.

Step 1 – Opening a database file

A selection box will be seen after login, listing the database (employers) files available in e@syFile™ Employer. Select which database or employer you will be working with.

Click **Continue** to proceed with the decryption and opening of the database file.



A pop-up message will be displayed once decryption has completed.



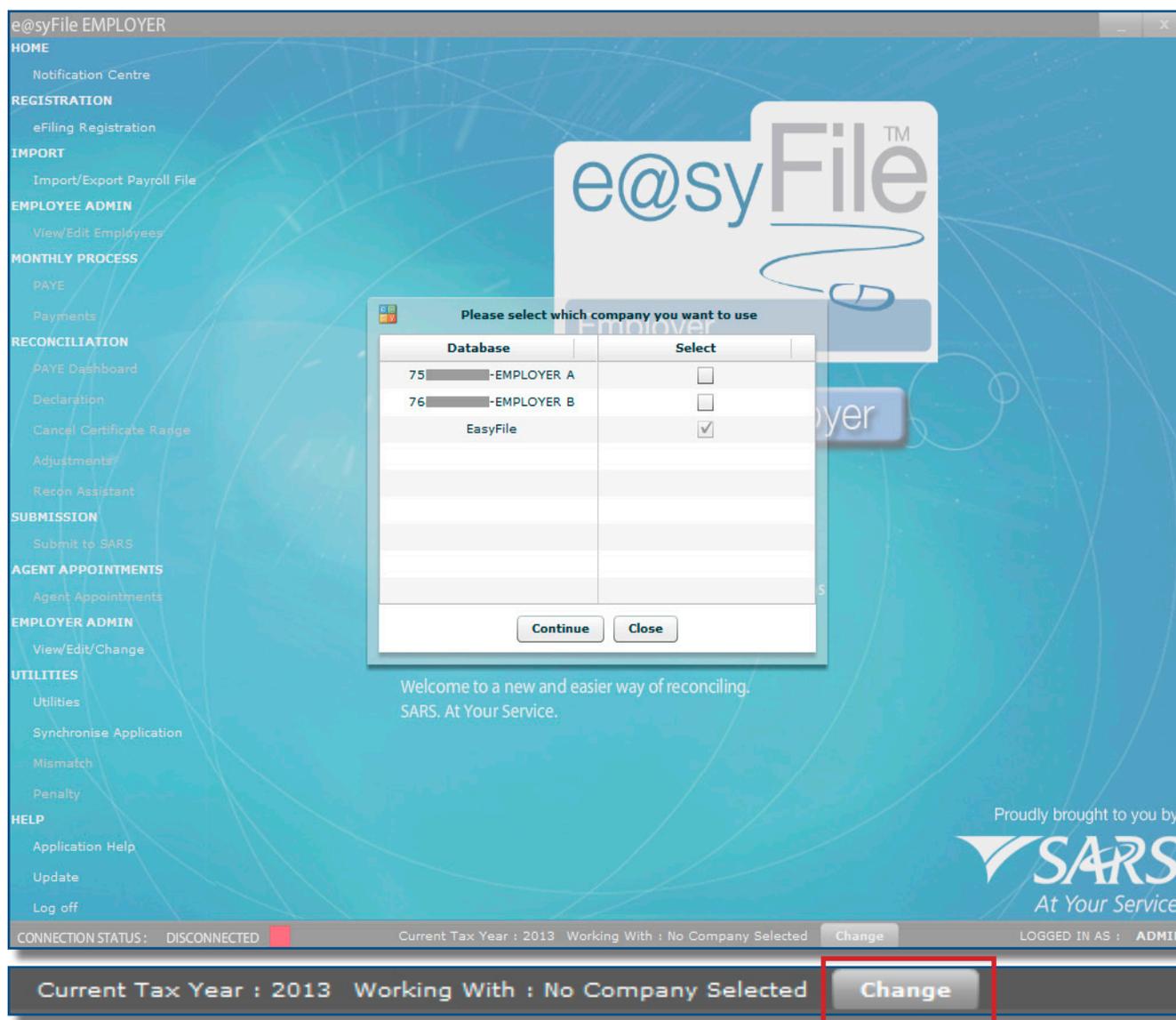
Once a specific database file has been opened, user will be able to continue to accessing the e@syFile™ Employer function or menu options for that specific employer.

Step 2 – Changing to another employer

Users with multiple employer/PAYE reference numbers included in their existing e@syFile™ Employer data may change between different database files if required:

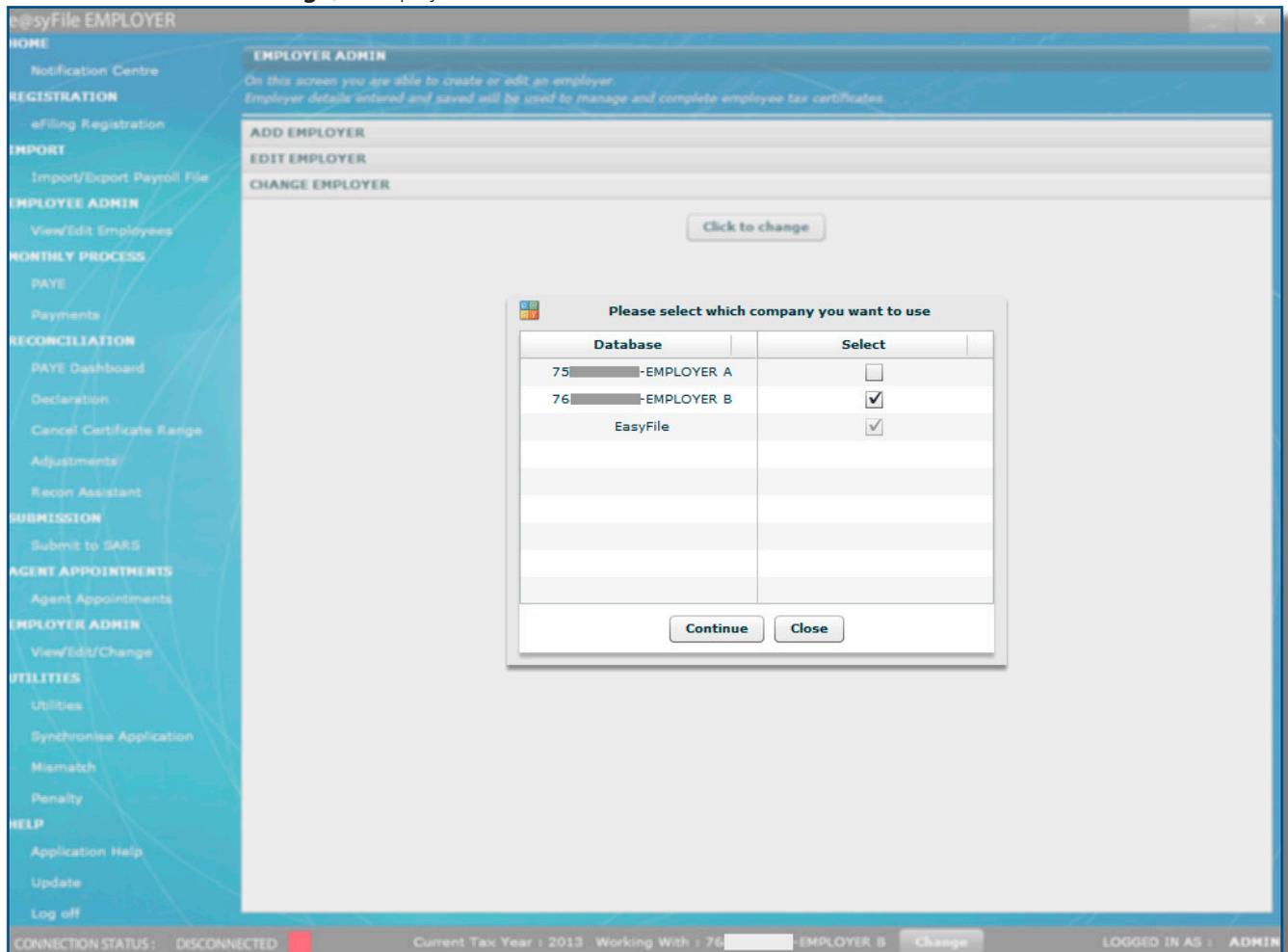
Two options are available to navigate between data files:

1. Click **Change** on the task bar at the bottom of the screen to display the list of available database files.



OR

- Click **View/Edit/Change** below **EMPLOYER ADMIN** on the left hand menu.
Click **Change Employer**
Select **Click to Change**, to display the list of available database files.



Select the relevant database file and click **Continue** to proceed.

3. NEW NOTIFICATION CENTRE

To improve the synchronisation process and retrieval of electronic correspondence, a Notification Centre has been added, which replaces the Inbox in the Utilities menu.

The new Notification Centre will automatically sort retrieved letters by PAYE number and letter type, making it easier to manage correspondence and related processes.

The new Notification Centre will include a count for all correspondence requiring attention. This includes unread items, as well as new items that can be retrieved by synchronising. The count for each letter type is displayed per employer/PAYE reference number.

- The Tax year column will now display the issue date of correspondence retrieved.
- Agent appointment correspondence will be added to individual employer database files once the notification has been opened from the menu. Details can be accessed and managed from the Agent Appointments menu option, once the letter has been opened.
- Similarly, bulk ITREG results will be available for export after the ITREG notification letter has been opened.

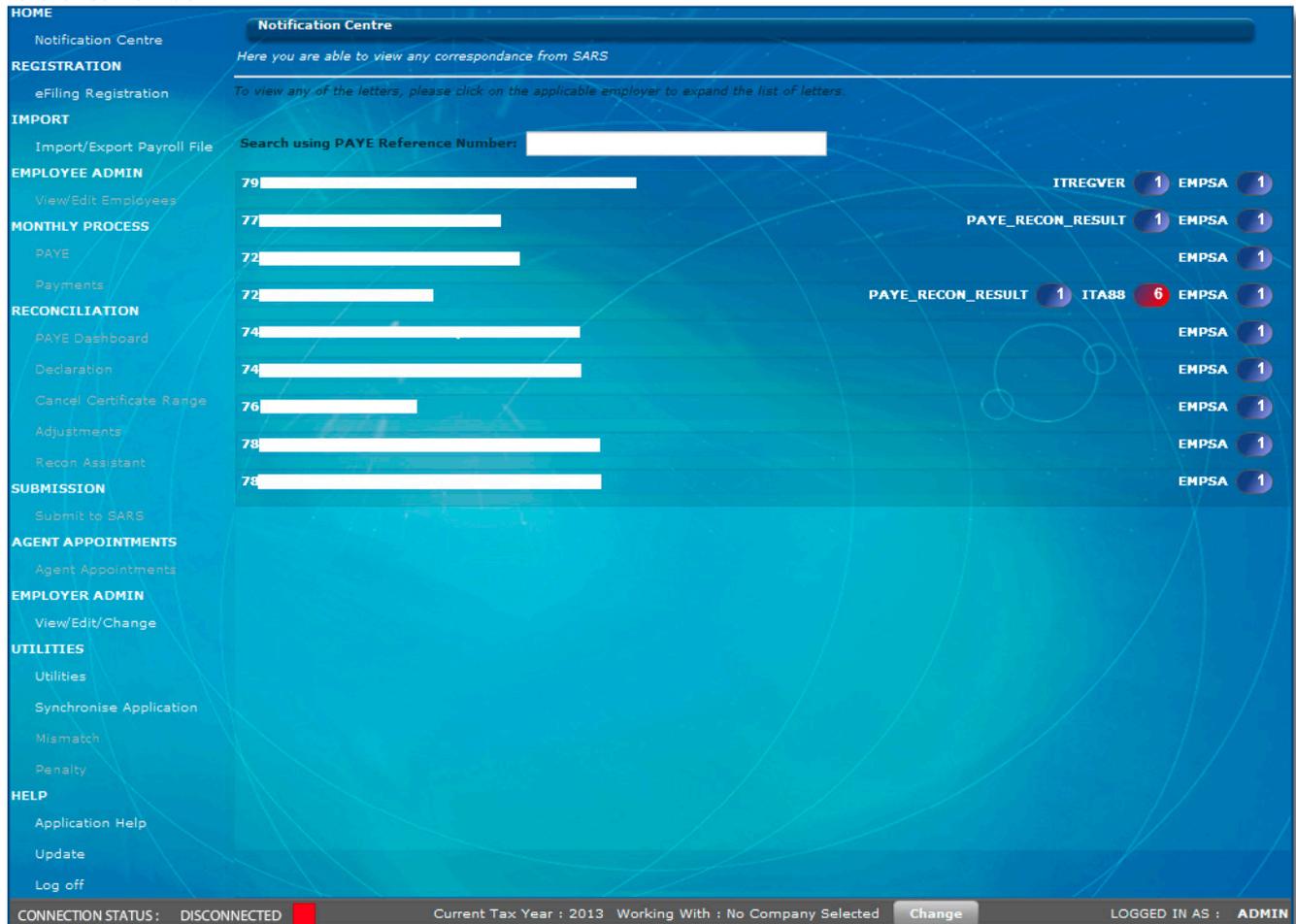
Step 1 – Synchronise software

To access the new Notification Centre, users will have to synchronise in order to retrieve correspondence. Click **Synchronise Application** to initiate the process.

For a detailed guide on how to synchronise, refer to **chapter 6 – eFiling Synchronisation** in the e@syFile™ Employer user guide available on www.sars.gov.za.

Step 2 – Notification Centre

Click Notification Centre on the left hand menu, to display all available correspondence, listed by employer/PAYE reference number.



Correspondence count numbers/indicators marked in red indicates important new correspondence that was retrieved during synchronisation requiring immediate attention.

If the mouse cursor is moved over the correspondence counts displayed on the right, a pop-up message shows a description of further options available.



Step 3

To view available correspondence, click the line entry for the relevant employer listed in the notification centre. e@syFile™ Employer will automatically open the correct employer database to access correspondence details for that PAYE reference number.

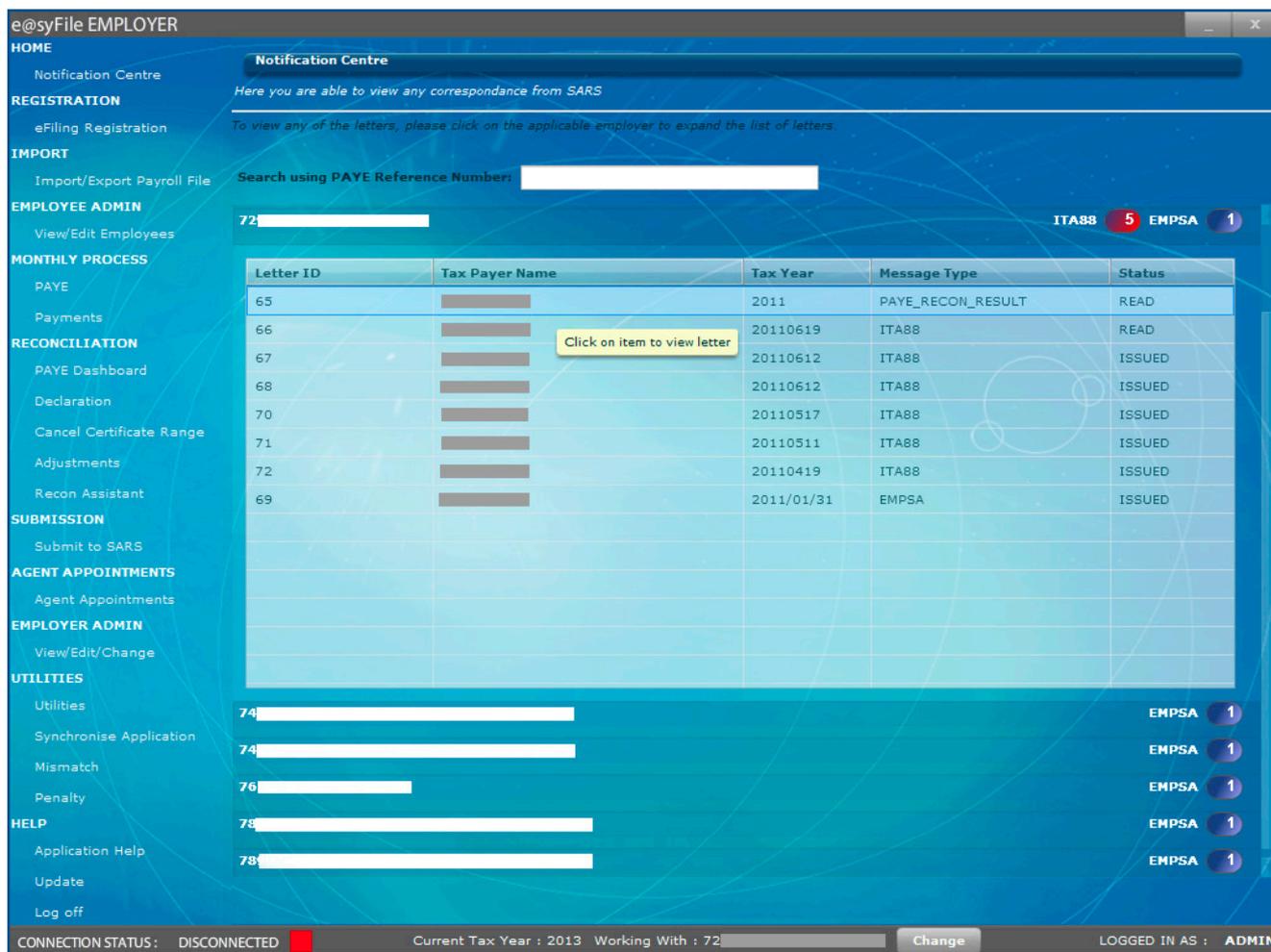
The screenshot displays the e@syFile EMPLOYER interface. The left sidebar contains navigation menus for HOME, REGISTRATION, IMPORT, EMPLOYEE ADMIN, MONTHLY PROCESS, PAYE, RECONCILIATION, SUBMISSION, AGENT APPOINTMENTS, EMPLOYER ADMIN, UTILITIES, and HELP. The main area shows a 'Notification Centre' with a search bar for 'PAYE Reference Number'. Below the search bar is a table of correspondence:

Letter ID	Tax Payer Name	Tax Year	Message Type	Status
49	[Redacted]	2011	PAYE_RECON_RESULT	ISSUED
48	[Redacted]	2011/01/31	EMPSA	ISSUED

A modal dialog box titled 'e@syFile Company Select' is overlaid on the table, containing the text: 'The active e@syFile Employer database you are working on has been changed to 77 [Redacted]'. An 'OK' button is visible at the bottom of the dialog.

At the bottom of the interface, the status bar shows: CONNECTION STATUS: DISCONNECTED, Current Tax Year: 2012, Working With: 77, and LOGGED IN AS: ADMIN.

Click **OK** to view the available correspondence.

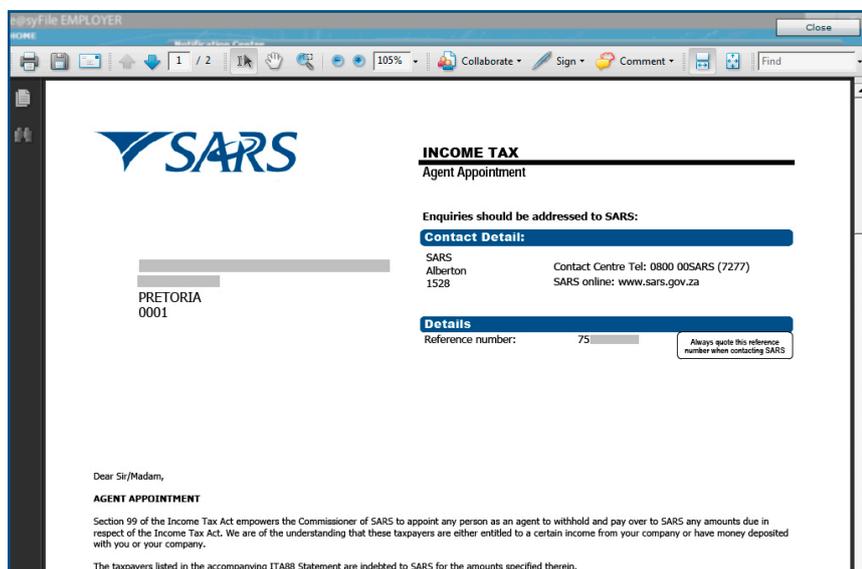


The details displayed include letter type and status for all available correspondence.

Note: Agent appointment notifications must be opened to add the details to the Agent Appointments menu for processing.

Step 4

To view any specific correspondence listed in the Notification Centre, double-click on the relevant line item. Once opened, the status will be updated from **ISSUED** to **READ**.



4. UPDATE TO THE INDIVIDUAL/BUNDLED INCOME TAX REGISTRATION (ITREG) PROCESS

With the introduction of the e@syFile™ Employer Notification Centre, there has been a minor change to the synchronisation process to obtain your individual/bundled ITREG results.

The change only affects the way results are returned. Therefore, registration requests are still submitted by selecting the employees to be registered using the '**View/Edit Employee function**'. Click **Bundled IT Reg** to view the registration status for each employee, and where necessary, submit an individual or bundled ITREG request to SARS.

If the registration request is completed immediately, a popup message will provide feedback on the registration outcome. However, if additional time is required for SARS to process the registration request, a message will be displayed to advise that the results will be made available after 24 hours.

With the introduction of the new Notification Centre, the employer can easily identify which companies have pending ITREG requests. These will be shown with a '**Pending Regs**' indicator together with the count of pending items.



To obtain your results for pending ITREG (individual or bundled) requests:

Step 1

Select the company with pending ITREG requests in the Notification Centre. You will receive a confirmation message that the selected company has been made the active employer.

Step 2

Click **Synchronise Application** and select either **All** or **Income Tax Registration** option. Click **Sync**, and you will be requested to provide your eFiling login details.

If results for pending ITREG registration requests are available:

- An alert pop-up message will be received in the bottom right hand corner to confirm the results have been received
- The results will automatically update the Employee records in the attached company database.

Step 3

To view your ITREG results, select **View/ Edit Employees**

Step 4

Select the company from the dropdown box and click **IT Bundled Reg**.

The registration status for each employee will be displayed. Where an Income Tax reference number has been provided, this can be obtained by viewing the employee record.

5. CREATING, MERGING AND RESTORING OF DATABASES IN e@SYFILE™ EMPLOYER

5.1 CREATING A BACKUP OF YOUR DATABASE

It is important to make frequent back-ups of your PAYE information. The backup process on e@syFile™ Employer is quick and simple.

Step 1

Click on **Utilities**

Step 2

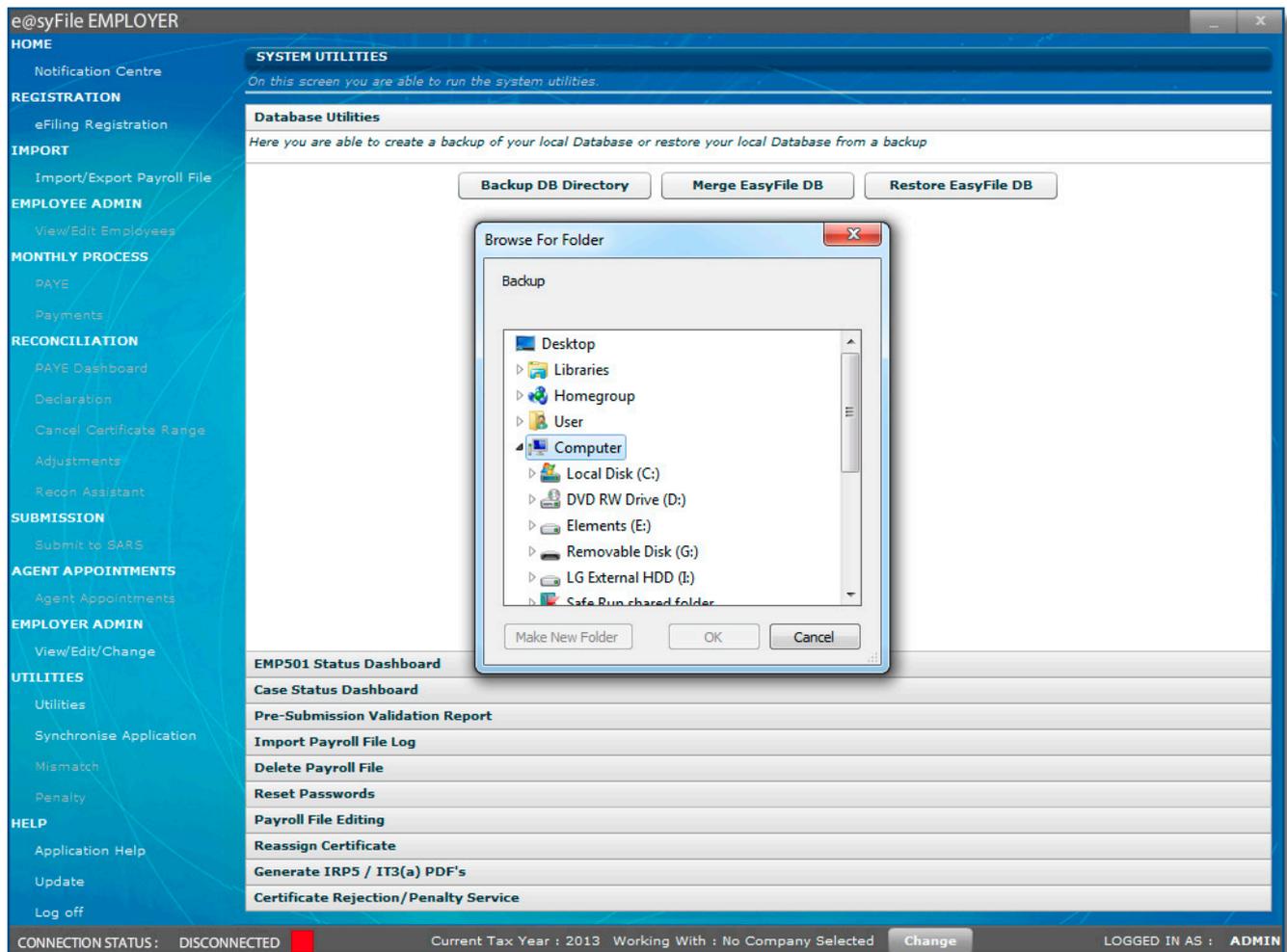
Click on **Database Utilities**

Step 3

Click on **Backup DB Directory**

Step 4

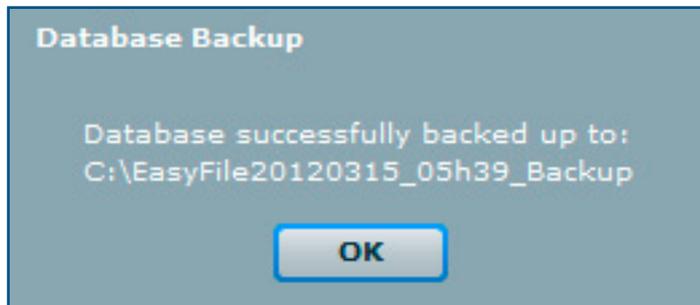
Select a destination folder and click **OK**



Step 5

A message will be displayed indicating that the database back-up was successful, click OK.

Note: Back-up files are all named in the following manner to make it easy to locate the most recent back-up file: [EasyFile]+[date]+[time of backup]+[Backup]. New back-up files will be zipped (compressed) and will include data for all the PAYE reference numbers included in the e@syFile™ Employer database.



Ensure the e@syFile™ Employer login details, which created the back-up, are saved with the back-up files.

The e@syFile™ Employer login details, which created the back-up file, will be needed when restoring the back-up. The encrypted data contained in the back-up will not be accessible unless the e@syFile™ Employer login details which created the back-up are used, due to the new added precaution – New database encryption and decryption, to secure sensitive information – refer to step 2 below for more information.

5.2 MERGE MULTIPLE DATABASES

This process should be used where:

- Multiple branches or different employees complete manual certificates and payroll files, and these should be merged for the reconciliation.
- Data for different financial periods should be merged onto one single database.

With the introduction of split database files for each PAYE number within the e@syFile™ Employer directory, the merge process has been amended to combine one employer database file at a time. When merging another user's data with your existing e@syFile™ Employer database, one employer database will be selected, to merge with your data.

This will enable tax practitioners, payroll consultants and users with multiple PAYE reference numbers to create e@syFile™ Employer database or back-up files for a single PAYE reference number.

Note 1: To ensure that no certificates are lost during the merge process, different certificate numbers or ranges should be assigned to the different staff members preparing manual certificates. Back-up all data to be merged, and transfer these files to a selected folder on the PC where the various databases will be merged.

Note 2: A new backup file (version 6 and later) will need to be 'unzipped' before the data can be merged with the existing e@syFile™ Employer data. Access the folder where the back-up has been saved that you wish to restore. Extract or 'unzip' the file before proceeding with the merge process.

Step 1

Click **Utilities**

Step 2

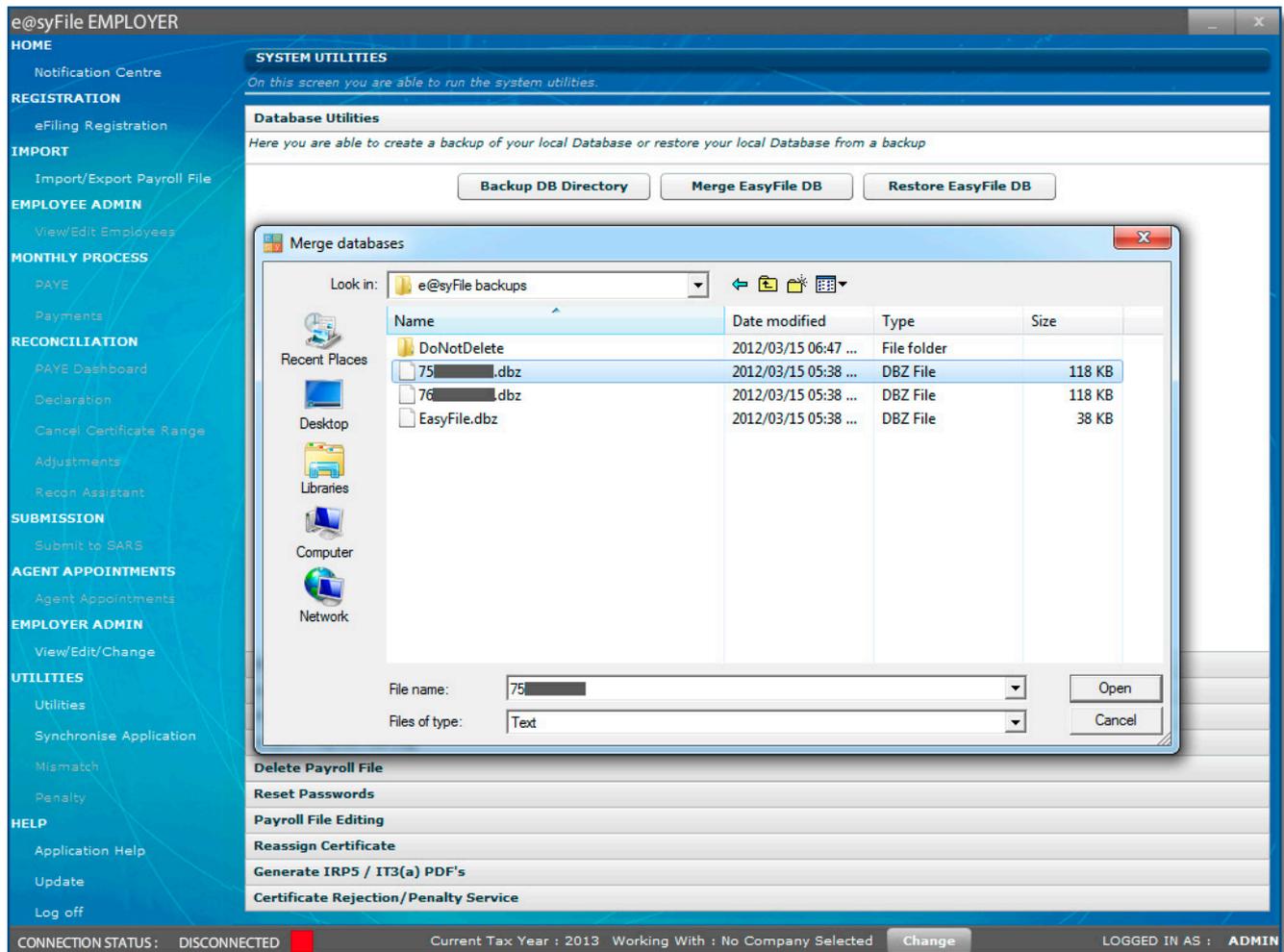
Click **Database Utilities**

Step 3

Click **Merge**

Step 4

1. **Backups created on version 5.0.9 or prior:** Select the relevant back-up file from the destination folder where it was saved.
Click **Open** to begin the merge process.
2. **Backups created on version 6 and later:** Select the PAYE number file within the backup directory from the destination folder where it was saved. (You will need to “unzip” the back-up folder first)
Click **Open** to begin the merge process.

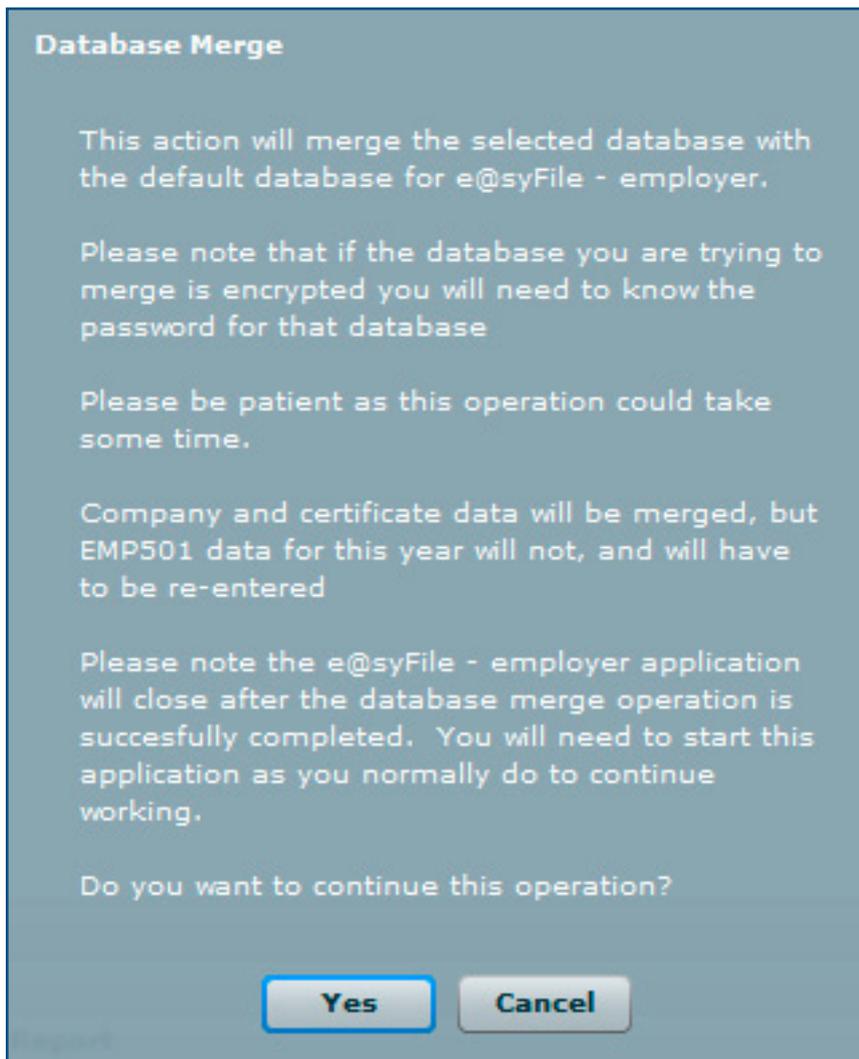


Step 5

Read the pop-up message carefully before proceeding with the merge process.

IF YOU DON'T HAVE A BACK-UP, CLICK CANCEL AND FIRST MAKE A BACKUP.

If you already made a backup of your data, click **Yes** to continue.

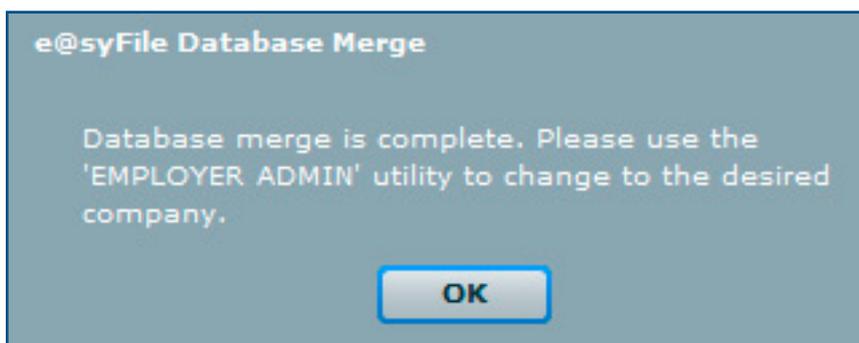


Step 6

Merging a new, encrypted back-up file, will require the e@syFile™ Employer login details to be completed. Click **Validate** to proceed.

Step 7

- **Back-up file created on version 5.0.9 or prior:** Additional messages will reflect the status of the merging process, and prompt a restart of the software once the merge has been successfully completed.
- **Back-up file created on version 6 and later:** A pop-up message will appear once the process has been completed. To access the database file merged, use the **Change Employer** menu option to select the relevant database file.



Step 8

To merge multiple database files, repeat step 4-7 above.

5.3 RESTORE DATABASE FROM A BACK-UP

Step 1

Click **Utilities**

Step 2

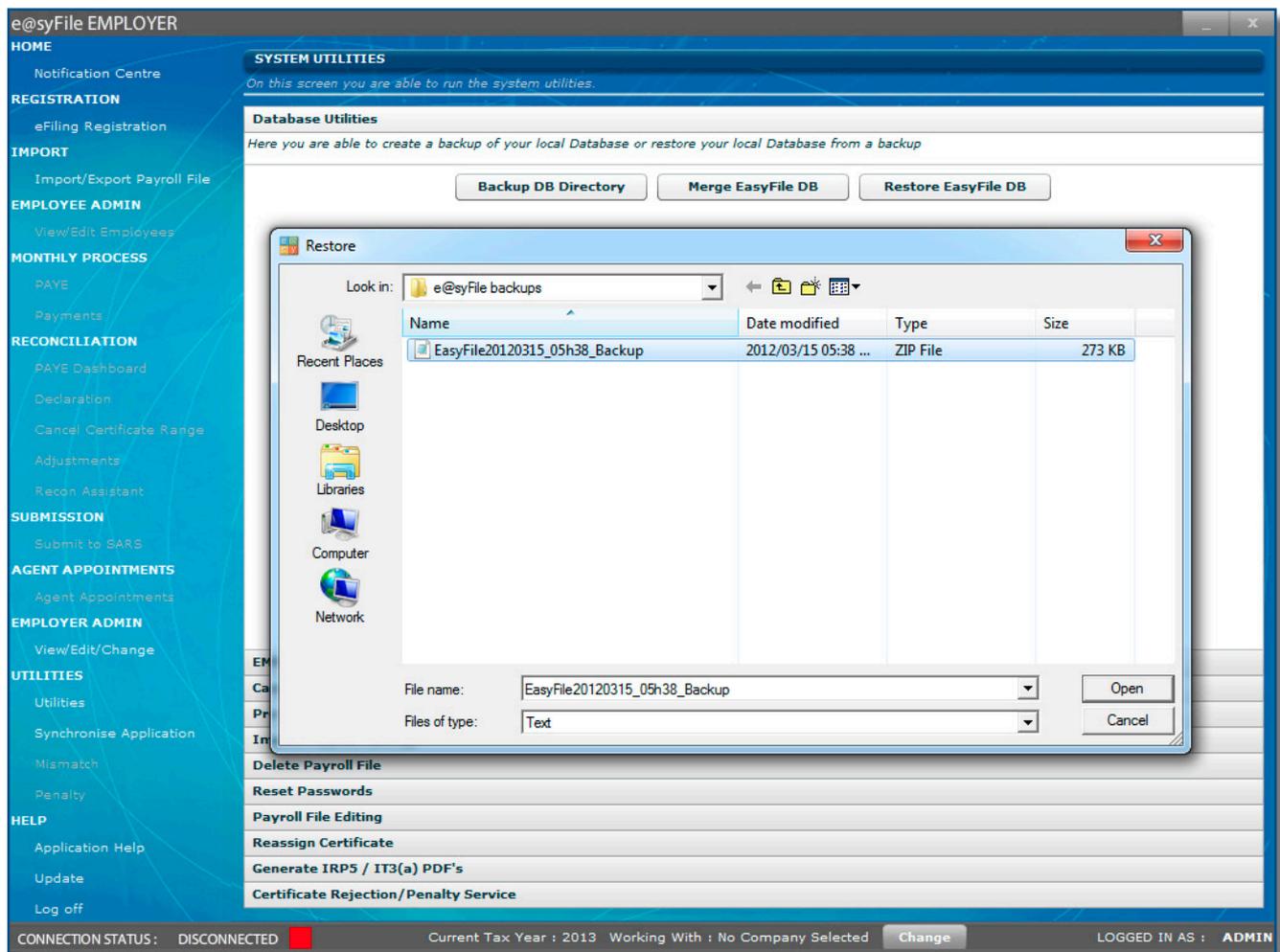
Click **Database Utilities**

Step 3

Click **Restore**

Step 4

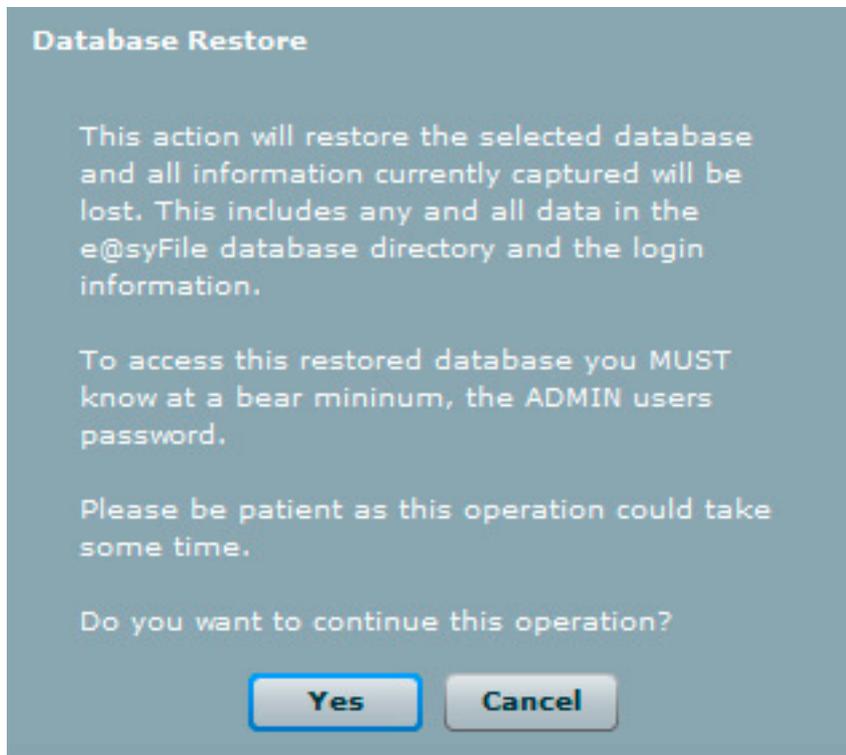
Select the location from which to restore the database, and select the back-up file you wish to restore.



Step 5

Click **Open**

The e@syFile™ Employer login details of the user that created the back-up file will be needed when restoring the back-up.



Step 6

A message will be displayed indicating that the database will be restored. Click **Yes**

Step 7

A message is displayed indicating that the database restore is complete. Click **OK**

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APRIL 2012



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