



Process Automation

PAIA Manual



PROCESS AUTOMATION MANUAL PREPARED IN TERMS OF SECTION 51 OF THE PROMOTION OF ACCESS TO INFORMATION ACT (ACT 2 OF 2000)

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1. Contact details required under PAIA Section 51(1)(a)

- Information Officer / Head of Private Body: Mr. Larry Smith
- Postal Address of Process Automation: P.O. Box 1915, Randburg 2125, South Africa
- Street Address of Process Automation: 148 Epsom Avenue, North Riding AH, Randburg, 2169, South Africa
- Telephone: +27 11 462 0222
- Fax.: +27 11 462 0615 (if available)
- General PAIA/POPIA e- Mail: popia@process-auto.com
- Deputy Information Officer / Person delegated to deal with PAIA requests: Ms. Devashnee Moodley
- E-mail address for PAIA requests: popia@process-auto.com
- Website: www.process-auto.com

2. The PAIA Guide and Information Regulator Contact Details

The Information Regulator has made available, in terms of PAIA, a Guide containing information reasonably required by any person who wishes to exercise any right contemplated in PAIA or POPIA. The Guide explains the objects of PAIA and POPIA, the manner and form of a PAIA request, assistance available from Information Officers and the Information Regulator, remedies available to requesters, and the manner of lodging complaints with the Information Regulator.

The Guide is available in the official languages of South Africa and may be inspected or obtained from the Information Regulator or from its website.

Information Regulator contact item	Details
Physical address	Woodmead North Office Park, 54 Maxwell Drive, Woodmead, Johannesburg, 2191
Telephone	010 023 5200
Toll-free number	0800 017 160
General enquiries	enquiries@infoeregulator.org.za
PAIA complaints / forms	Refer to the Information Regulator website for current PAIA forms and complaint channels

3. Records available in terms of other Legislation

Process Automation may hold records required by, or available in terms of, South African Legislation applicable to its operations. The list below is limited to legislation that is likely to be relevant to the business and should be reviewed periodically by the Information Officer.

Legislation	Typical records held, where applicable
Companies Act 71 of 2008	Company incorporation, statutory registers, resolutions, director and shareholder records, financial statements and related company records.
Income Tax Act 58 of 1962	Tax returns, payroll tax records, employee tax certificates and records of payments to SARS.
Value-Added Tax Act 89 of 1991	VAT registration records, VAT returns, tax invoices and related accounting records.
Basic Conditions of Employment Act 75 of 1997	Employment records, working time, leave, remuneration and termination records.



Legislation	Typical records held, where applicable
Labour Relations Act 66 of 1995	Disciplinary, grievance, dispute, consultation and labour relations records.
Employment Equity Act 55 of 1998	Employment equity plans, reports and workforce profile records, where applicable.
Skills Development Act 97 of 1998 and Skills Development Levies Act 9 of 1999	Training records, SETA records and skills development levy records.
Unemployment Insurance Act 63 of 2001 and Unemployment Insurance Contributions Act 4 of 2002	UIF registration, declarations and contribution records.
Compensation for Occupational Injuries and Diseases Act 130 of 1993	Accident reports, claims records and compensation-related records.
Occupational Health and Safety Act 85 of 1993	Health and safety policies, risk assessments, inspections, incidents and statutory compliance records.
Promotion of Access to Information Act 2 of 2000	PAIA manual, PAIA request records, notices, fee records and related correspondence.
Protection of Personal Information Act 4 of 2013	POPIA compliance records, data subject requests, security safeguards, operator agreements and breach records.
Electronic Communications and Transactions Act 25 of 2002	Electronic transactions and communications records where applicable.
Consumer Protection Act 68 of 2008	Customer, warranty, product, service and complaint records, where applicable.
Broad-Based Black Economic Empowerment Act 53 of 2003	B-BBEE certificates, supplier information and related verification records, where applicable.
Customs and Excise Act 91 of 1964	Import/export and customs records, where applicable.
National Environmental Management Act 107 of 1998 and National Water Act 36 of 1998	Environmental and water-use compliance records, where applicable.

4. Records automatically available

Information that is published on the Process Automation website is automatically available without a requester having to submit a PAIA request. Process Automation has not, as at the date of this manual, published a notice in terms of PAIA section 52(2) specifying additional categories of records that are automatically available without request. The Information Officer may update this section if additional categories are made automatically available.

5. Subjects and categories of records held by Process Automation

General information about Process Automation can be accessed at www.process-auto.com. A requester is not automatically entitled to access the records listed below. Access may be refused in accordance with PAIA, including the grounds of refusal in Sections 62 to 70.



5.1 Companies Act and Corporate Records

- Documents of Incorporation and constitutional documents
- Company registers and statutory records
- Minutes and resolutions of directors, shareholders and committees
- Records relating to the appointment of auditors, directors, prescribed officers, public officers and company secretaries
- Shareholder, share, member and securities records, where applicable
- Policies, governance and authorisation records

5.2 Financial Records

- Accounting Records
- Annual Financial Statements and Management Accounts
- Asset Registers
- Bank Records, Payment records and reconciliation
- Debtors and Creditors' statements and invoices
- Tax records and returns
- Insurance, rental and finance agreements
- Financial policies and procedures

5.3 Tax and Statutory Payroll Records

- PAYE, UIF, SDL and Workmen's Compensation Records
- Documents issued to employees for income tax purposes
- Records of statutory payments made to SARS or other statutory bodies
- VAT records and returns

5.4 Personnel Records

- Employment Contracts and Employee Files
- Leave, Payroll, Remuneration, Benefits and Pension/Provident fund Records
- Training, SETA and Competence Records
- Disciplinary, grievance and performance records
- Health and safety, accident and occupational health records
- Employment equity and workplace forum or union-related records, where applicable

5.5 Procurement Records

- Supplier and Contractor Agreements
- Standard Terms and Conditions
- Supplier onboarding and due diligence records
- Purchase orders, supplier lists and product/service information
- Procurement Policies and Procedures

5.6 Sales and Customer Records

- Customer contact and account details
- Credit application information
- Quotations, orders, contracts and service records
- Information and records provided by customers or third parties



5.7 Marketing Records

- Advertising and promotional material
- Marketing communications and consent records, where applicable
- Website enquiry and campaign records

5.8 Risk Management and Audit Records

- Audit reports and audit working papers
- Risk Management Frameworks and Plans
- Insurance, incident and compliance records
- Internal control and governance records

5.9 Safety, Health and Environmental Records

- Safety, Health and Environment Risk Assessment
- Medicals, induction access records, training records
- Inquiries, inspections, examinations and correspondence with authorities
- Incident, training and compliance records

5.10 Information Technology Records

- Computer and mobile device usage policies
- Disaster recovery and business continuity plans
- Hardware and software asset registers
- Information security policies, standards and procedures
- Information technology systems documentation, user manuals and project implementation plans
- Software licensing records

6. Purpose of Processing Personal Information

- To support sales, marketing, customer engagement and field service activities
- To support recruitment, employment, payroll, training, benefits and staff management
- To support procurement and engagement with suppliers, consultants, contractors and operators
- To support customer projects, support obligations, contractual performance and legal compliance
- To support external auditing, certification, inspection, regulatory and legal obligations
- To manage enquiries from the general public and website users
- To support company governance, investor, media and stakeholder engagement where applicable
- To protect company systems, premises, assets, information and personnel
- To detect, prevent and respond to fraud, security incidents, legal claims and compliance risks



7. Categories of Data Subjects and Personal Information Processed

The table below provides more detailed categories of data subjects and examples of personal information processed by Process Automation.

Data subject category	Examples of personal information processed
Customers / Clients	Names, job titles, contact details, company registration details, VAT numbers, account information, order history, project records, service records, billing details and correspondence.
Employees and Job Applicants	Names, ID/passport numbers, contact details, employment history, qualifications, references, contracts, payroll, tax, leave, disciplinary, training, performance, benefits, medical aid and pension/provident fund information.
Suppliers, Contractors, Consultants and Operators	Names, contact details, company registration details, VAT numbers, B-BBEE information, banking details, contracts, purchase orders, performance records and correspondence.
Website Users and General Public	Names, contact details, enquiry details, website usage information, communication preferences and correspondence, where applicable.
Shareholders, Directors, Officers and Governance Stakeholders	Names, contact details, identification information, appointment records, statutory records, meeting records and governance correspondence.
Regulators, Auditors, Inspectors, Legal Advisers and Statutory Bodies	Names, contact details, professional details, correspondence and records required for compliance, inspection, audit, legal or statutory purposes.
Media and other Stakeholders	Names, contact details, interaction records and correspondence.

8. Planned Recipients of Personal Information

Personal information may be disclosed to the following recipients where lawful, necessary and proportionate:

- Legal, Statutory and Regulatory authorities
- Customers and business partners, where required for project or contractual purposes
- Law enforcement authorities, courts and legal advisers
- Tax authorities, financial institutions and payment service providers
- Medical schemes, pension/provident funds, insurers and employee benefit providers
- Industry bodies, certification bodies, auditors and inspectors
- Trade unions or employee representatives, where applicable
- Service providers and operators, including IT, cloud, payroll, HR, security, courier, accounting, professional advisory and document-management providers
- Suppliers, OEMs and support partners where required for delivery, service, warranty, support or contractual obligations



9. Planned Trans-border Flows of Personal Information

Process Automation may transfer or make personal information accessible outside South Africa where required for cloud hosting, software support, supplier or OEM support, customer support, business partner engagement, project delivery, e-mail and collaboration platforms, website analytics, social media platforms, or other lawful business purposes.

Where personal information is transferred outside South Africa, Process Automation will take reasonable steps to ensure that the recipient is subject to a law, binding corporate rules or a binding agreement that provides an adequate level of protection, or that another lawful basis under POPIA applies.

The Information Officer should periodically review actual cross-border processing arrangements, including cloud, CRM, ERP, support portal and OEM/vendor systems.

10. Security Measures to Protect Personal Information

Process Automation implements reasonable technical and organisational safeguards appropriate to the nature of personal information and the risks of processing. These may include:

- Physical access controls for premises and restricted areas
- User access controls, role-based permissions, password controls and multi-factor authentication where appropriate
- Endpoint protection, anti-virus/anti-malware controls, patching and network security controls
- Backups, disaster recovery and business continuity measures
- Secure disposal, retention and archiving controls
- Staff confidentiality obligations and information security awareness/training
- Supplier, operator and third-party confidentiality and security obligations
- Policies and procedures for acceptable use, information security, incident response and data handling
- Periodic review, audit, monitoring or testing of security measures
- Incident response processes for suspected or actual security compromises

11. How to make a request for access to Records

A requester must complete the prescribed PAIA Form 02: Request for Access to Record [Regulation 7] and submit it to the Information Officer, Deputy Information Officer or Head of the Private Body using the contact details in section 1 of this manual. A personal requester seeking access to a record containing their own personal information is not required to pay the request fee. Other requesters must pay the prescribed request fee before the request is processed, where applicable.

- The requester must provide sufficient detail to enable Process Automation to identify the requester, the record requested and the form of access required.
- The requester must indicate whether the request is made in their own name or on behalf of another person and must attach proof of identity and, where applicable, proof of authority.
- The requester must identify the right sought to be exercised or protected and explain why the requested record is required for the exercise or protection of that right, where required by PAIA.



- Process Automation will notify the requester of the outcome of the request in the prescribed form and will indicate any access fees payable before access is granted.
- Access to records may be refused on the grounds set out in PAIA, including protection of privacy, commercial information, confidential information, safety, security, research information and privileged records.
- A requester may lodge a complaint with the Information Regulator if dissatisfied with a decision, non-response, fees, extension of time, form of access or other PAIA-related matter. A requester may also approach a court where PAIA permits.

12. Availability of this Manual

This manual is available on the Process Automation website at www.process-auto.com, at the Head Office for public inspection during normal business hours, to any person upon request and payment of any prescribed fee, and to the Information Regulator upon request.

First publication date of this manual: 01 July 2021

Revised/latest publication date of this manual: 29 June 2026

Signature of Information Officer / Head of Private Body

Name: _____

Date of Signature: _____

Each page should be initialled or otherwise approved in accordance with Process Automation document-control requirements before final publication/submission.

13. Fees in Respect of Private Bodies

The current prescribed private-body PAIA fees must be applied as published by the Information Regulator. The Information Officer should verify the fee schedule on the Information Regulator website before publication or submission, as prescribed fees may change.

Fee item	Amount / basis
Request fee payable by every requester, other than a personal requester	R140.00
Photocopy or printed black-and-white copy of an A4 page or part of a page	R2.00 per page
Printed copy of an A4-size page or part of a page	R2.00 per page
Copy in computer-readable form on flash drive, where the requester provides the flash drive	R40.00
Copy in computer-readable form on compact disc, where the requester provides the CD	R40.00
Copy in computer-readable form on compact disc, where Process Automation provides the CD	R60.00
Transcription of visual images, or copy of visual images	Actual outsourced cost / quotation, where applicable
Transcription of audio record, per A4-size page	R24.00



Fee item	Amount / basis
Copy of audio record on flash drive or compact disc	R40.00 if requester provides media; R60.00 if Process Automation provides CD
Search and preparation fee	R145.00 per hour or part of an hour, excluding the first hour, capped at R435.00
Deposit if search exceeds six hours	One-third of the applicable access fee
Postage, e-mail or other electronic transfer	Actual expense, if any

14. Prescribed PAIA Forms and Annexures

The prescribed form for requesting access to a record is Form 02: Request for Access to Record [Regulation 7] – [Annexure A](#). The prescribed outcome form is Form 03: Outcome of request and of fees payable [Regulation 8] – [Annexure B](#). Current versions of the forms should be downloaded from, or checked against, the Information Regulator website before publication or submission.

[Annexure A](#) below contains a working Form 02 layout for inclusion with this manual. Process Automation should replace it with the latest official Information Regulator Form 02 if the Regulator publishes an updated version after the date of this manual.

15. Document Approval

Approved by:	Larry Smith (Information Officer)	Designation:	Chief Executive Officer
Signature:		Date Signed:	29/06/2026
Approved by:	Devashnee Moodley (Deputy Information Officer)	Designation:	Head of People, Risk & Business Improvement
Signature:	 D. Moodley (Jun 29, 2026 12:58:39 GMT+2)	Date Signed:	29/06/2026



Annexure A – Form 02: Request for Access to Record [Regulation 7]

Note: Proof of identity must be attached by the requester. If a request is made on behalf of another person, proof of authority must also be attached.

Form section	Information to be completed
To	Information Officer / Deputy Information Officer / Head of Private Body: Process Automation (Pty) Ltd, popia@process-auto.com
Request made	☐ In my own name ☐ On behalf of another person
Personal information of requester	Full names; identity/passport/registration number; postal address; street address; e-mail address; telephone number; capacity in which request is made.
Person on whose behalf request is made	Full names; identity/passport/registration number; relationship/capacity; proof of authority attached.
Record requested	Description of record or relevant part of the record; reference number if available; any further particulars enabling the record to be located.
Type of record	☐ Written or printed record ☐ Visual images ☐ Audio record ☐ Computer/electronic/machine-readable record
Form of access	☐ Printed copy ☐ Written transcription ☐ Copy on flash drive ☐ Copy on compact disc ☐ Copy saved on cloud storage/server ☐ Inspection at premises
Manner of access	☐ Personal inspection ☐ Postal service ☐ Courier ☐ E-mail ☐ Cloud share/file transfer Preferred language: _____
Fees	A request fee must be paid before the request will be considered, except where the requester is a personal requester. Access fees may be payable depending on the form of access and the time reasonably required to search for and prepare the record.
Particulars of right to be exercised or protected	Indicate the right to be exercised or protected and explain why the record requested is required for the exercise or protection of that right.
Notice of decision	The requester will be notified in writing whether the request has been approved or denied and, if approved, the costs relating to the request, if any. Preferred manner of correspondence:
Signature	Signed at _____ on this ____ day of _____ 20____. Signature of requester / authorised person: _____



Annexure B - Form 03: Outcome of request and fees payable [Regulation 8]

Process Automation should use the official Form 03 issued by the Information Regulator to communicate the outcome of a PAIA request and any fees payable. A current copy should be obtained from the Information Regulator website before use.

Field	Details
Reference number	_____
Requester	_____
Date request received	_____
Decision	☐ Granted ☐ Partially granted ☐ Refused
Reasons for decision / PAIA grounds	_____
Request fee / access fee / deposit	_____
Form and manner of access granted	_____
Complaint / further remedy information	Requester may lodge a complaint with the Information Regulator or exercise any remedy available under PAIA.

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Final Audit Report

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