

# **IRIS OpenSpace**

## **Getting Started Guide**

### **Version 1.3**

## *Dear Customer,*

Welcome to your guide for setting up, configuring and using IRIS OpenSpace.

*IRIS OpenSpace is an online collaboration tool allowing you to share documents with your clients. You are able to publish documents to the IRIS OpenSpace online portal and your clients are then able to log into IRIS OpenSpace to view and/or approve the reports.*

*You can also capture client enquiries through OpenSpace, as well as adding a log in screen to your website to enable your clients to access your OpenSpace portal from your website.*

*IRIS OpenSpace can incorporate your branding, colours and logos both online and in all communications; this provides a fully branded portal to your clients where they can safely and securely exchange their confidential information with you.*

- *Upload, store and approve documents online*
- *Reports can be accessed anywhere an internet connection is available*
- *Quick and easy to setup with no software to install*
- *Increases efficiency*
- *Reduces carbon footprint demonstrating an environmentally friendly solution*
- *Reduces distribution costs including printing, postage and processing*
- *Fully secure – only you and your client can view documents*
- *Allows clients immediate 24/7 access to report information*
- *Easy access to E-Approvals and E-Checklist*

*More information can be found at*

*<http://www.iris.co.uk/support/iris-openspace-support>*

## Account Creation and Setup

### Creating an OpenSpace practice account

Go to [www.irisopenspace.co.uk](http://www.irisopenspace.co.uk), click on 'Need an Account?'



### Create a new account

Complete the form below to create a new account for your accountancy practice or payroll bureau, please do not use this form if you are a client of an accountant or bureau.

- We have a range of packages available to best suit your needs view [here](#)
- To complete the registration a confirmation email will be sent to your email address with an activation link
- You will be contacted by a sales representative to confirm your package

#### New Organisation Details

Organisation Name	<input type="text"/>	*
Customer Reference	<input type="text"/>	
Postcode	<input type="text"/>	*
Telephone	<input type="text"/>	*

#### New Administrator

Email Address	<input type="text"/>	*
Confirm Email Address	<input type="text"/>	*
First Name	<input type="text"/>	*
Surname	<input type="text"/>	*

☐ I have read and agree to the [terms and conditions](#)

\* required

[Create](#)

Already have an account? Please either [login](#) or [reset your password](#).

*The above screen will then appear to enter information. You are required to enter;*

*NB: if the customer reference number or postcode are found to already exist within the system, return to the login screen and use forgotten password link to recover an existing account.*

*Once details have been entered, click to Create*

### Account created, e-mail confirmation required

Thank you for entering your contact information. We will be in touch within 48hrs to verify your details and provide your reference number so you can activate your free space.

An activation e-mail has been sent to [irisptest@yahoo.com](mailto:irisptest@yahoo.com), click on the link in the e-mail to complete your registration.

[Continue](#)

*An email confirmation will then be sent. Will need to log in and view this email to confirm the account registration.*



## Activate Your IRIS OpenSpace Account

Dear IRIS PS Test,  
Thank you for signing up to IRIS OpenSpace.  
To complete your registration click <https://www.irisopenspace.co.uk/account/confirm/fe61d8ed-04ea>.  
If you have any questions regarding the product please contact our Customer Support team or email [support@iris.co.uk](mailto:support@iris.co.uk).  
As a reminder, please note that your use of IRIS OpenSpace is governed by the terms and conditions you agreed to when you signed up, available here: <https://www.irisopenspace.co.uk/Home/TermsAndConditions>.

practicesales@iris.co.uk    iris.co.uk    0844 815 5555

*By clicking on the link within the email, will be directed to a create password screen.*

## Enter your chosen password

Thank you for registering with IRIS OpenSpace, please enter your password below

Email address	<input type="text" value="irispstest@yahoo.com"/>
First Name	<input type="text" value="IRIS PS"/>
Last Name	<input type="text" value="Test"/>

---

New password	<input type="password"/>	*
Confirm new password	<input type="password"/>	*

*Once a password has been created, can then login OpenSpace account.*

## Interface

*When first logging into OpenSpace, you will see a terms and conditions screen. Must read and agree to the terms and conditions before continuing. These can however be accessed within the application at any time should you wish to read thoroughly at a later date.*

### Terms and Conditions

Terms & Conditions of Use

THIS AGREEMENT is BETWEEN:

IRIS Software Limited, incorporated and registered in England and Wales with company number 03196054, whose registered office is at Riding Court House, Riding Court Road, Datchet, Slough SL3 9JT ("We/Us/Our")

AND:

The person, firm or company that has registered to use the Services ("Customer/You/Your")

You should print a copy of these terms and conditions for future reference but please note clause 17.2.

Use of the Services constitutes acceptance of these terms and conditions. Please understand that if you refuse to accept these terms and conditions, you will not be able to use the Services.

1. Definitions & Interpretation

1.1 Definitions

"Agreement" means these terms and conditions for the supply of Services as may be amended by Us from time to time and any other documents expressly incorporated by Us;

"Charges" means any charges due under this Agreement as set out on Our Website or otherwise made known to you at the time of registration;

"Client End User" means any client of Yours using the OpenSpace product to facilitate the provision of accountancy services by You to them, including for the purpose of sharing files between You and them. The relationship between such client and Us will be governed by a separate agreement;

"Commencement Date" means the date You accept these terms;

"Consultants" means the employees, subcontractors and consultants We use to perform any of the Services;

"Delivery Date" means the estimated date(s) when the Services shall first be made available to You;

"Documentation" means (where available) the operating manuals, user instructions, technical literature and other related materials We supply to You in any form pursuant to this Agreement for aiding the use of the Services;

"Group Company" means (in relation to each party) any subsidiary, group or parent company from time to time of a party (as such words are defined in the Companies Act 2006);

☐ I have read and agree to the Terms and Conditions

## Home Screen

*The first screen that you will see is the dashboard. It is worth familiarising the customer at this point with the layout and functionality contained here, starting with 3 tabs along the top of the screen.*

Home Settings Subscription

Dashboard Clients Upload File

DA SHBOARD

Refresh Thomas selected

Client Name	Filename / File Description	Date Uploaded	Size	Owner
No records to display.				

Unread Files Received 0

E-APPROVALS

E-CHECKLIST

WEBSITE ENQUIRIES

feedback

IRIS OpenSpace

Terms and Conditions | Privacy Policy | Cookie Policy | Help | Customer Support

## **Home**

*The home tab contains the practice dashboard, client area and the ability to upload a file to IRIS OpenSpace.*

## **Dashboard**

*The dashboard gives a view of all unread files that have been received, documents that have been sent for and are awaiting electronic approval, those that have been approved and rejected.*

*It also contains all outstanding electronic checklists and will display any website enquiries that have been submitted, should you have an OpenSpace enquiry form linked to website.*

*Within the main screen, they can then sort the files displayed by client name, file name and description, date uploaded, size and owner.*

## **Clients**

*The clients screen gives the option to view all clients assigned. You can export a full client list, add a new client from here or search for client information using the search bar.*

*Also can edit the information of an existing client by selecting the checkbox to the left of the client name and clicking 'Edit Client' in the top right hand corner.*

*Clients can be sorted here by client ID, name, status, last login, total files and storage size being used.*

## **Upload File**

*NB when on the clients tab, the upload file button will not appear. To access this, you will need to return to the dashboard tab*

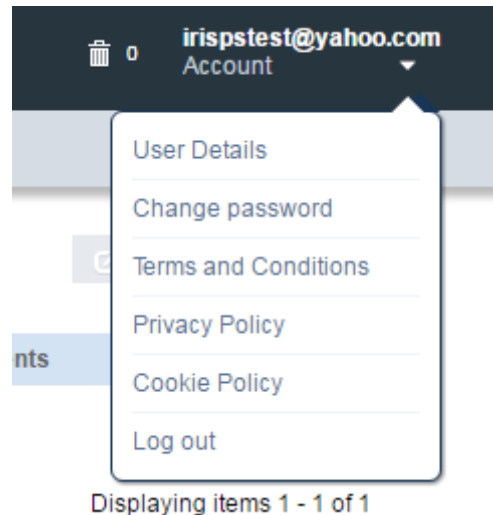
*Clicking upload file will bring the file upload mechanism.*

## Account

Account settings are displayed in the top right hand corner of the screen, next to the deleted items.

This allows to alter details, change password or view the various policies and conditions held within the system.

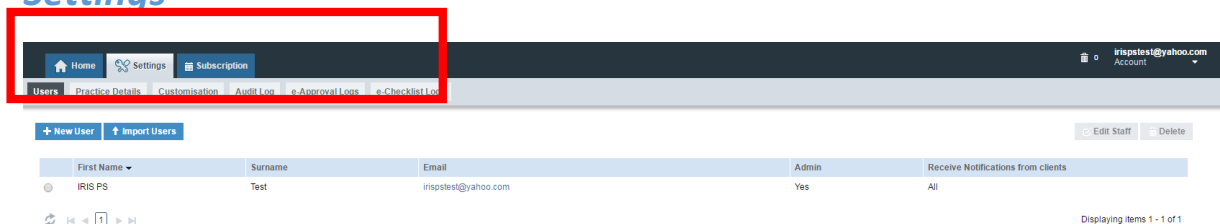
You can also log out from here.



## Deleted Items

Clicking here will display all recently deleted items

## Settings



The settings area allows to customise all aspects of the OpenSpace system. The intricacies of this area will be covered in more detail later on, but the basic functionality available is as follows;

## Users

From here, can create new practice users and also import a list of users into the system. Can also edit existing staff member profiles here, including assigning staff members to clients and changing permissions.

## Practice Details

Practice details enables to edit practice information, including the administrator email address. This is the email address that IRIS will send any important alerts and announcements to.

From here can also edit the default folder structure for each client. This will alter the files that each new client sees, depending upon how the practice wishes to organise its files.

## Customisation

The customisation section holds all functionality to enable to brand and customise the OpenSpace portal. This section will be covered in further detail later in the session.

## Audit Log

The audit log contains details of every action within the system. This can be sorted by date, user, action, client and data

## E-Approval Logs

E-approval logs allow to track all documents that have been uploaded for electronic approval including the status of the document, who it has been approved by and when it was last interacted with.

## E-Checklist Logs

E-Checklist logs allow to track all electronic tax e-checklists that have been uploaded to the client from IRIS.

## Subscription

The screenshot displays the 'Subscription' page in the OpenSpace portal. The navigation bar at the top includes 'Home', 'Settings', and 'Subscription'. The 'Subscription' page has two tabs: 'Your Subscription' (active) and 'Invoice History'. The 'Your Subscription' tab shows a 'Update Your Subscription' section with a '0GB' status and a 'Proceed' button. Below this, there are logos for Visa and MasterCard. To the right, there is a usage bar showing 'Usage: 0.02GB of 2GB (1%)' and a table with subscription details.

Subscription	
Status	Enabled
Subscription Id	5509
Subscription Cost	£0.00 (inc VAT)
Created Date	24 March 2014
IRIS Free Space	2 GB



## ***Your Subscription***

*The subscription tab enables the to manage storage requirements and view current usage. On the right hand side of the page they are able to see total files, clients and users on the system.*

*Should you require further details of the files on the system, can view files and folders within the client screen. This will enable them to sort by file size to find the largest files, if for instance they feel space allocation to be incorrect.*

*From here, able to purchase additional space to be used on OpenSpace account. An additional 1GB of space is priced at £5 per month.*

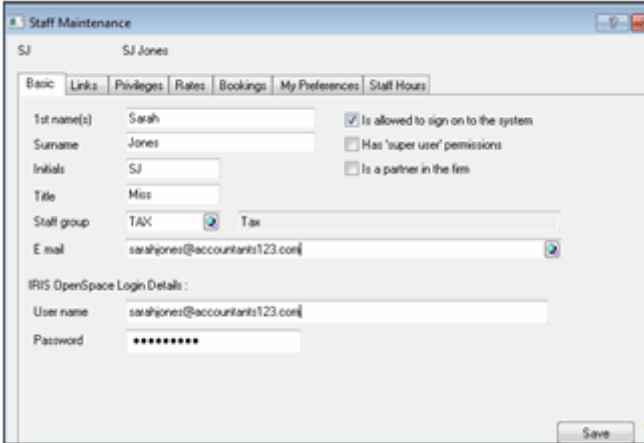
*Alternatively, the client can purchase space in larger amounts through account manager/Sales.*

## ***Invoice History***

*Can view all historical invoices and also print copies of invoices from here*

## ***Creating a Client***

*You can automatically create a new client by uploading a document from IRIS. In order to do this, they will need to make sure that your OpenSpace login details have been entered into the system, under System Maintenance > Staff > Staff Maintenance.*



The screenshot shows a web-based form titled "Staff Maintenance" for a user named "SJ Jones". The form has several tabs: "Basic", "Links", "Privileges", "Rates", "Bookings", "My Preferences", and "Staff Hours". The "Basic" tab is active, displaying fields for personal and professional details. The "IRIS OpenSpace Login Details" section is also visible, showing the user's login information.

Basic	
First name(s)	Sarah
Surname	Jones
Initials	SJ
Title	Miss
Staff group	TAX
E mail	sarahjones@accountants123.com
IRIS OpenSpace Login Details :	
User name	sarahjones@accountants123.com
Password	*****

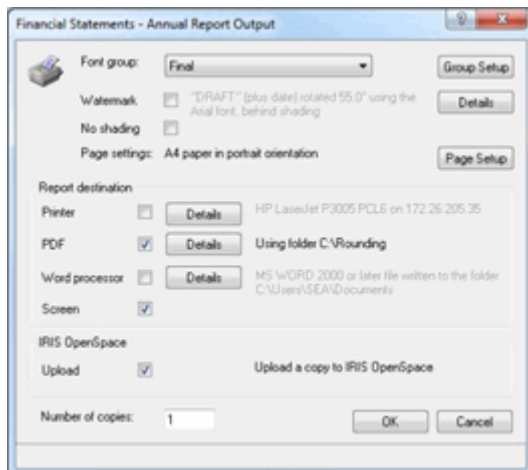
Buttons: Save

## Uploading from IRIS Suite to your IRIS OpenSpace client

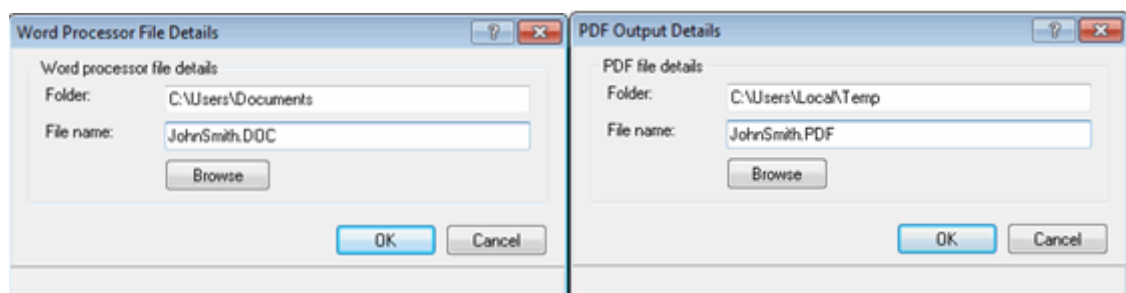
If you are uploading documents for an IRIS client, you do not need to create a New Client. Uploading files from IRIS automatically creates the client in IRIS OpenSpace and saves it in the Uploaded from IRIS Practice Suite folder.

Accounts Production, Reports, Select Report

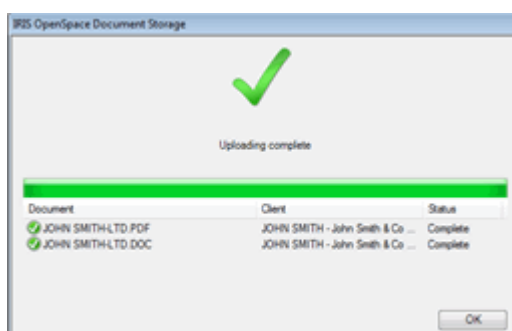
Tick PDF and/or Word processor and select Upload.



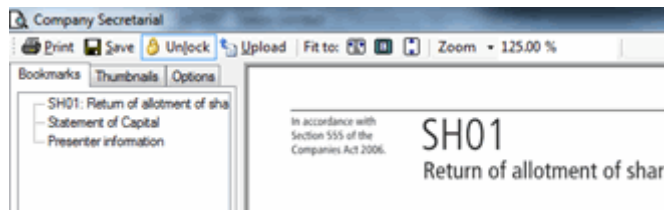
An output details box will allow you to change or OK the folder location and file name of the Word or PDF document. You can upload a Word and PDF document simultaneously.



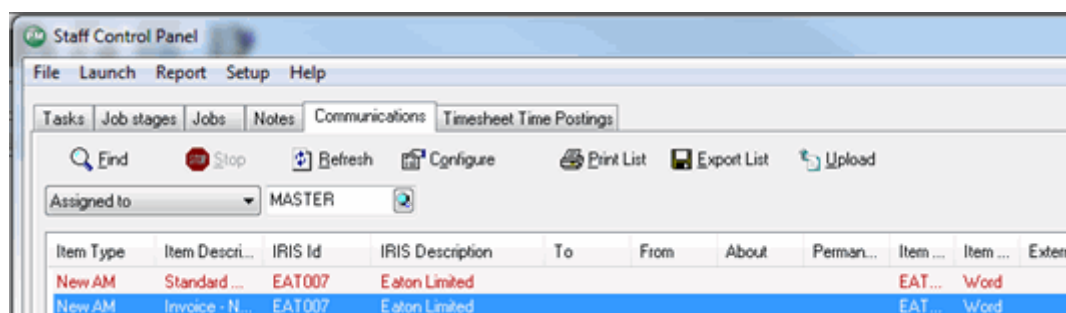
An Uploading complete box displays when the file has successfully uploaded to IRIS OpenSpace from IRIS.



Company Secretarial – Files can be uploaded wherever you see the Upload option.



Communications Tab - Upload files from the Communications tab by selecting Upload




Non-client specific reports from Time and Fees cannot be uploaded from IRIS.

Business/Personal Tax - Select a client, select report, Upload

### *Creating a Client manually in OpenSpace*

*When creating a new client within the OpenSpace browser, head to the Client tab from the Home screen and select 'New Client'*

New Client X



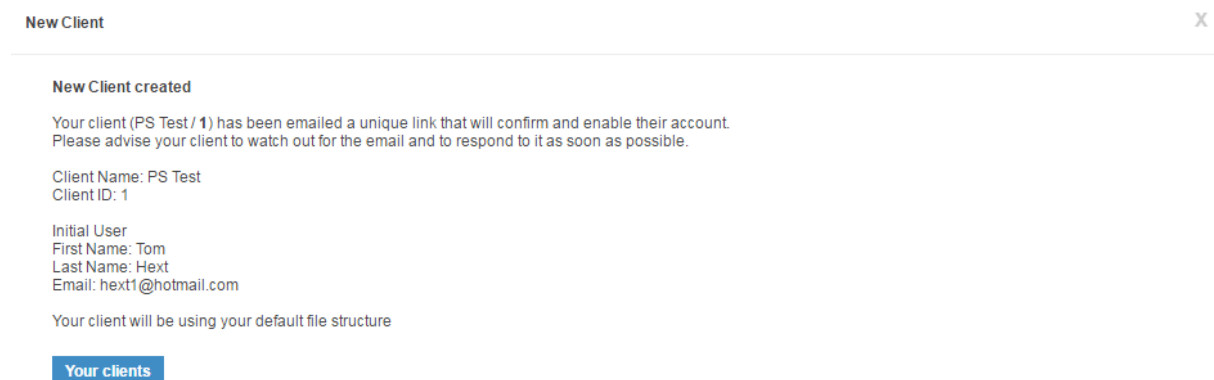
Create a new client and optionally a user and their login details (this can be also done later).  
An email will be sent to them to continue setup of their account if you decide to create them now and to notify them

Client		User (Optional)	
Client Name	<input type="text"/>	Email	<input type="text"/>
Client ID	<input type="text"/>	Confirm Email	<input type="text"/>
Notify Client	<input type="checkbox"/>	Contact Forename	<input type="text"/>
		Contact Surname	<input type="text"/>
		<input type="button" value="Create"/>	<input type="button" value="Cancel"/>

*Will then need to enter a client name, client ID and choose whether or not they would like the client to be notified that account has been created.*

*They will then have the option to add a user who will then be contacted to activate account.*

*NB: If the email used is already in use, this will display a warning. The process can continue, however must be aware that the client already has an OpenSpace account, in most cases with another accountant and must take this into account.*



*Once the new client has been created, they will receive an email to confirm account and create a password. The practice will then receive a notification of when this has occurred.*

## ***Adding multiple users to a client***

*An IRIS OpenSpace client can be accessed by multiple client users. If you create a client and upload documents to the client either manually or from IRIS Accountancy Suite or IRIS Payroll, any IRIS OpenSpace any users under the Add Client User will be able to view the accounts when login to IRIS OpenSpace account.*

*Within the Home tab, click the 'Clients' menu item and select the client you wish to add a user to.*

*Click 'Edit Client' then click 'Add Client User'. Enter the Email Address, Confirm Email, First Name and Surname then click 'Register' when complete.*

## Creating multiple clients with the same email

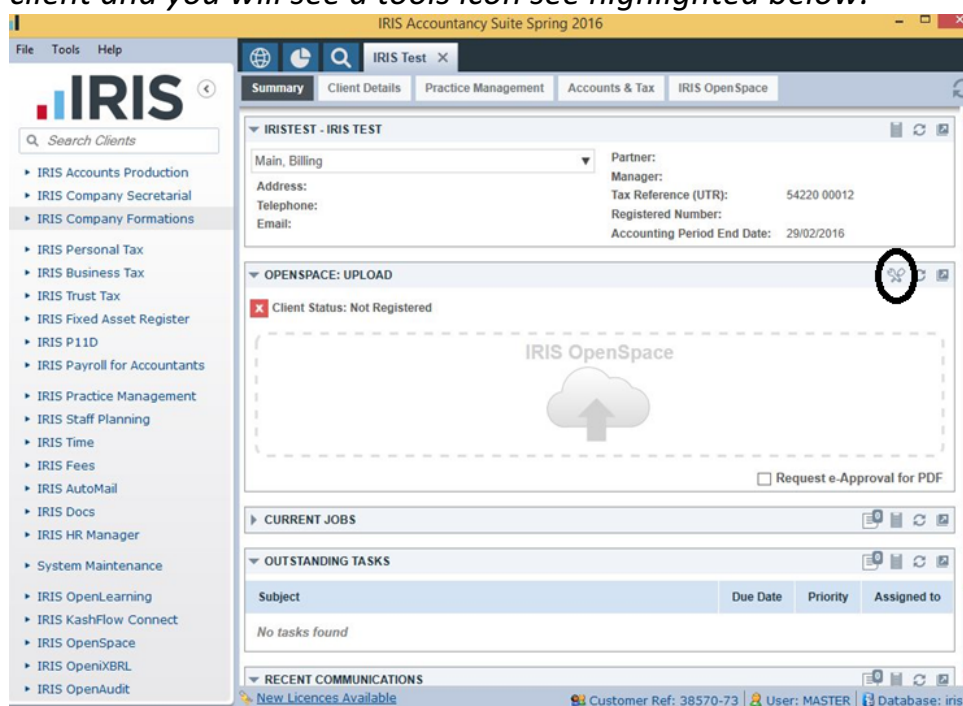
You are able to create clients and attach them to an email address you have already used for another client. When they login to IRIS OpenSpace account will be able to see multiple documents.

## Client Statuses

- **Not Registered** - The client has been created automatically by uploaded file from IRIS Accountancy Suite, you will need to complete the user details
- **Registration Sent** -An activation email has been sent to the client. We are waiting for client user to activate account and setup a password
- **Inactive** - The client user has activated account, created a password but not logged in yet.
- **Active** -The client has logged in.

## Linking OpenSpace client account to IRIS

If the client has been created manually directly in OpenSpace and not showing as linked in IRIS. In the IRIS portal menu click on the magnifier glass, select the client and you will see a tools icon see highlighted below.

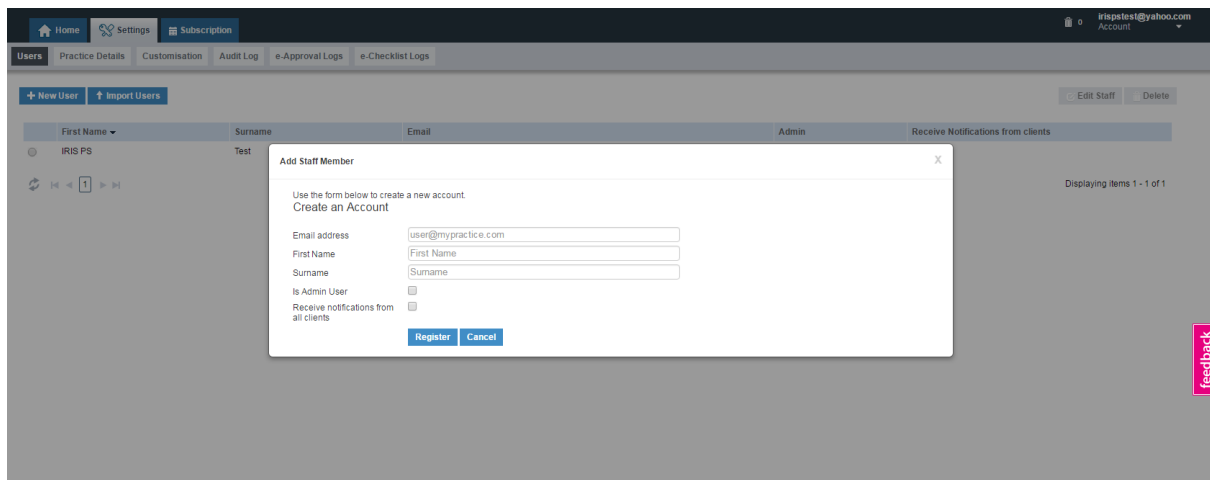


This will bring up a new screen which will allow you to link or to create as a new client in OpenSpace.

## Creating a Staff User

To create a new user within the practice, will need to go to the Settings tab and click on Users.

They can then click to add New User

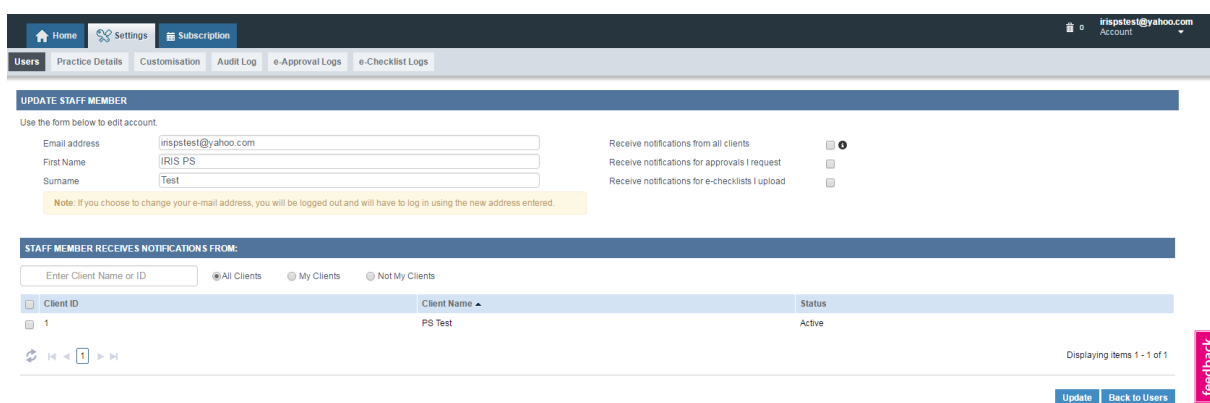


The screenshot shows the 'Add Staff Member' form. The form is titled 'Add Staff Member' and includes a close button (X). Below the title, it says 'Use the form below to create a new account. Create an Account'. The form has the following fields: 'Email address' (with the value 'user@mypractice.com'), 'First Name', 'Surname', 'Is Admin User' (checkbox), and 'Receive notifications from all clients' (checkbox). There are 'Register' and 'Cancel' buttons at the bottom. The background shows the 'Users' tab in the application, with a table containing one user: 'IRIS PS' with 'Test' as the surname and 'Admin' as the role. The user is receiving notifications from all clients.

You are required to add a unique email address, first and surname and will then need to confirm whether this user is an admin user and will receive notifications from all clients. If you do not wish the client to receive all notifications, leave this unchecked. We will cover the customisation of notifications in more detail further.

## Editing an Existing Staff User

To edit an existing user, needs to select the user using the checkbox and select Edit User.




The screenshot shows the 'UPDATE STAFF MEMBER' form. The form is titled 'UPDATE STAFF MEMBER' and includes a close button (X). Below the title, it says 'Use the form below to edit account.'. The form has the following fields: 'Email address' (with the value 'irispstest@yahoo.com'), 'First Name' (with the value 'IRIS PS'), 'Surname' (with the value 'Test'), 'Receive notifications from all clients' (checkbox), 'Receive notifications for approvals I request' (checkbox), and 'Receive notifications for e-checklists I upload' (checkbox). There is a note: 'Note: If you choose to change your e-mail address, you will be logged out and will have to log in using the new address entered.'. Below the form, there is a section titled 'STAFF MEMBER RECEIVES NOTIFICATIONS FROM:' with a search bar and radio buttons for 'All Clients', 'My Clients', and 'Not My Clients'. Below this, there is a table with columns 'Client ID', 'Client Name', and 'Status'. The table contains one row: '1', 'PS Test', 'Active'. There are 'Update' and 'Back to Users' buttons at the bottom right. The background shows the 'Users' tab in the application, with a table containing one user: 'IRIS PS' with 'Test' as the surname and 'Admin' as the role. The user is receiving notifications from all clients.

Can then edit the details entered for that client user and can also customise the notifications that the user will receive.

## Customising Staff Notifications

There are a number of options available to customise the notifications that staff members receive. First of all, select whether the user receives notifications from all clients, whether they receive notifications for approvals that they request and whether they also receive notifications on e-checklists that they upload.

Receive notifications from all clients	<input type="checkbox"/> 
Receive notifications for approvals I request	<input type="checkbox"/>
Receive notifications for e-checklists I upload	<input type="checkbox"/>

Can also then assign a user to a particular client by searching based upon client ID. This will mean that the user then receives notifications based upon that client's activity only.

**STAFF MEMBER RECEIVES NOTIFICATIONS FROM:**

☒ All Clients ☐ My Clients ☐ Not My Clients

<input type="checkbox"/> Client ID	Client Name ▲	Status
<input type="checkbox"/> 1	PS Test	Active


     

Displaying items 1 - 1 of 1

[Update](#) [Back to Users](#)

## Importing Staff Users

Can also import a large number of practice users by using the Import Users function. Clicking this will display the following message and allow the customers to download a sample file, before uploading a file into the system to add users.

**Import Staff Users** 

Use the following upload function when you need to create a large number of staff users quickly.

This method will **NOT** send your staff members an activation email and therefore you must provide a suitable password in the import file; IRIS OpenSpace requires a minimum of 6 characters with at least 1 letter and 1 number.

The file must be a CSV file with headings; "email", "firstname", "lastname" and "password". Click [here](#) to download a sample file.

Select a File

## Branding and Customising the OpenSpace Portal

IRIS OpenSpace can be fully branded with the practice's logo, colours and other information such as SMTP server and website integration.

**The support team do not support branding issues.** It is clearly defined that once you apply branding to the OpenSpace portal and begins to customise the system, we cannot support issues with colour matching, website integration etc.

Home Settings Subscription

Users Practice Details Customisation Audit Log e-Approval Logs e-Checklist Logs

irispstest@yahoo.com Account

General Details

Logo & Colours

SMTP Settings

Email General

Email Templates

Enquiry Form

Login Code

Miscellaneous

Documentation

Configure the name of your client portal, the URL it will be accessed from. Please see the documentation for more information.

Portal Name

URL Type External Website

URL

Log Out Return URL

Email Handler

Custom Folder 14616-C399A33A87

Save

If you are in any doubt about how to correctly configure the URL Type, URL and Email Handler fields please consult with your website developer before proceeding; incorrectly configured may result in users receiving email notifications with broken links.

feedback

To

access the customisation menu, click Settings and Customisation. A set of tabs will then appear on the left hand side of the screen. The first of these is **General Details**.

### Portal Name

Input the name for your client portal, this will be used in the title bar of the browser and instead of the IRIS Logo if one is not uploaded.

### URL Type

Choose from either a sub domain of [irisopenspace.co.uk](https://irisopenspace.co.uk) domain or External Website.

- Sub-domain allows practice name to be prefixed to "irisopenspace.co.uk", so that a logo can be displayed on the login page.
- Only choose external website if user intends to embed IRIS Openspace into a website using an iFrame



## URL

*Input your chosen sub domain or external website URL. Please note; that entries into this field will affect the links that clients receive in the automated notifications, therefore if not correctly setup those links will not work correctly.*

- *For URL type sub domain simply enter the prefix the user wishes to appear in front of IRISOpenSpace.co.uk (andrewsandbrown for <https://andrewsandbrown.irisopenspace.co.uk>)*
- *For URL type external website enter the website address where the client portal page will be contained in an iFrame*

## Log Out Return URL

*This is the URL that a client will be sent back to after they log out of IRIS OpenSpace. Do not use this option if the customer plans to embed IRIS OpenSpace into an External Website using an iFrame.*

## Email Handler

*This is the specific page on the customer website that contains the IRIS OpenSpace iFrame, it provides the email notifications with links to redirect users correctly to an External Website. This field must only be completed if customer is embedding IRIS OpenSpace into an External Website with an iFrame.*

## Custom Folder

*The unique reference for any customised CSS; this reference is required if you plan to embed IRIS OpenSpace into an External Website using an iFrame.*

## Logo & Colours

### Practice Logo

*Upload an image of the practice logo to replace the IRIS logo on the login screen and in the footer bar. You can also replace the IRIS logo for clients who login via your chosen Sub-Domain (see General Details) the IRIS Logo is replaced there also. We recommend an image that is 348 pixels high and 66 pixels wide to get the optimum presentation of the logo.*

### Browser Icon

*Upload a FAV icon to replace the IRIS icon; this is the icon that client's browser will display when they bookmark/favourite the portal.*

### **Show Header Bar Logo**

*This will place the practice logo at the top of the application instead of in the footer bar, when clicked this will display a small business card with practice contact details taken from the Settings tab.*

### **Desktop Colours**

*Change the colours of IRIS OpenSpace to match the practice branding, this section specifically deals with what users on desktop/laptop computers will see. You can change the colour of additional items by creating a CSS file to upload into the advanced section. A sample CSS file can be downloaded from the IRIS OpenSpace Branding Guide page.*

### **Mobile Colours**

*This section specifically deals with the colour scheme of IRIS OpenSpace when clients login on a mobile device.*

### **Advanced**

*Advanced is not supported by IRIS; it allows a website developer to fully customise all aspects of IRIS OpenSpace. This should not be carried out as part of the setup process.*

### **Status**

*Set to 'Live' to turn on customisations; if set to "disabled" then IRIS OpenSpace will use the standard IRIS branding and logo.*

### **SMTP Settings**

*To send the IRIS OpenSpace email notifications from a practice email domain complete the SMTP Settings section with the customer's email server details:*

#### **Server**

*Enter the address of outbound email server eg. smtp.domain.co.uk*

#### **Port**

*Enter the port number required by outbound email email server eg. 25*

#### **Enable SSL**

*Select Enable SSL if email server operates through a secure port*

### ***Username***

*Enter the username for the email address that will be put into the From Address*

### ***Password***

*Input the relevant password*

### ***From Address***

*Enter the reply address that the emails show as coming from*

### ***Status***

*Set to "Live" when you have confirmed the SMTP settings are correct*

### ***Send Test Email***

*Press the Send Test Email button to send a test message to practice email address*

*Error messages displayed when sending testing emails from the SMTP Settings area will have come from your email server, you will need to look at the email server logs to successfully diagnose any issues encountered.*

*If you need to 'white list' the IRIS OpenSpace IP addresses on the email server to allow email notifications to come through, please add the following:*

***168.63.8.45 and 65.52.144.68.***

***Again, configuring the practice OpenSpace notifications to be sent from an email server is not supported by the IRIS Technical support team.***

### ***Email General***

*You can tailor the setup of email notifications, including altering the wording, layout and information held within the notifications.*

### ***Custom Disclaimer***

*Enter the practice email disclaimer here, this email disclaimer is appended to all email messages sent by IRIS OpenSpace. When messages are sent using the practice SMTP server the standard IRIS disclaimer is removed.*

## **Email Header**

*Upload image to go at the top of each email notification; the recommended size is 820 pixels to avoid image being displayed incorrectly with a height of 110 pixels.*

## **Email Footer**

*Upload image to go at the bottom of each email notification; the recommended size is 820 pixels to avoid image being displayed incorrectly with a height of 90 pixels.*

## **Status**

*Set to "Live" when you have confirmed the SMTP settings are correct.*

*The IRIS image(s) will be displayed in all email notifications unless they are both replaced, a blank image is supplied in the Sample Files.*

## **Email Templates**

*The content automated emails generated by IRIS OpenSpace can be edited in the Email Templates section:*

### **Template**

*Select the email that you want to edit, a description of the template is displayed on the right hand side of the drop down*

### **Email Tags**

*Available tags for the selected template can be added to the subject and body of the email notification*

### **Subject**

*Change the subject line of the selected email notification*

### **Message Body**

*Edit the contents of the selected email notification with a WYSIWYG editor*

## ***Send Test Email***

*Send a sample of the edited email to your email address prior to saving*

## ***Reset to Default***

*Undo your changes and revert to the standard template*

*Note: The 'Multiple Files Added...' templates have two templates; the one labelled 'Body' contains the message before the individual files are listed using the other template which just contains ##File\_Name##.*

## ***Login Code***

*You can add a login box onto website, using code provided within the customisation area within OpenSpace. This comes in HTML format and should be provided to web developer to add. If website is provided by IRIS, this comes as part of service.*

## ***Enquiry Forms***

*You can also embed a website enquiry form into website to capture enquiries from potential clients. These enquiries will then appear on OpenSpace dashboard under 'Website Enquiries'.*

*As with the login code option, must simply copy and paste the HTML code provided into website to enable the functionality. This should be provided to web developer for correct formatting if the site is not maintained by IRIS.*

***Adding login code and enquiry form HTML code to a website is not supported by the IRIS Technical support team.***

## ***Miscellaneous***

*When a document is uploaded to IRIS OpenSpace for approval, the system will insert a coversheet. You would like to use practice logo on this coversheet, simply need to set this option to 'Live'.*

## ***What's New***

*When new features are added to OpenSpace, this will be displayed to the customer in the form of a pop up message. You have the option to disable this both for staff and for clients, simply by checking the boxes provided.*

## Electronic Approval in IRIS Suite

When uploading from the IRIS Accountancy Suite you will need to generate your document/report from the required module as normal. During the report/document generation process you will receive an option to upload the file to OpenSpace.

The steps below are also applicable for the Openspace: Upload section on Client dashboards.

After requesting approval, the following screen displays.

IRIS OpenSpace - Request e-Approval

Client ID: OTEST1  
Client Name: openspacetest001  
File: OTEST1-Engagement Letter-MASTER-20170323-091458-004.pdf

**Request e-Approval options** ☐ Send email notification

Approvals required by:  
☒ Single user ☐ All users   
2 client users have been selected to receive the e-Approval request.

Choose an appropriate signing statement to appear on the coversheet:  
☒ Tax return approval ☐ Generic approval ☐ Custom approval  
openspacetest001 confirms that the information is correct and complete to the best of their knowledge and belief.  
187 character(s) and 2 line(s) remaining

Are you sure you would like this client to approve OTEST1-Engagement Letter-MASTER-20170323-091458-004.pdf?  
☒ Client has given consent to electronically approve their documents

The section Approvals required by has the following options:

**Single User** - if the document is uploaded to multiple users, only one requested approval is required for the document to be marked '**Approved**'.

**All Users** - if the document is uploaded to multiple users, all users to whom a request has been sent must approve the document before it is marked '**Approved**'.

**Select Users** – if the document requires approval from some of the OpenSpace users but not all, this is possible. If '**Single user**' is selected, select which users to request approval from. Only one of those users needs to approve the document for it to be marked as '**Approved**'.

## Electronic Approval in OpenSpace

*Once you have selected the client and folder to upload file to you will see the the screen below*

### Upload to C2's Documents Folder

Choose files to upload to your client's OpenSpace. You can select more then one file at a time. You can also drag and drop files anywhere on this page to start uploading.

Name	Size
No records to display.	
   	

Displaying items 0 - 0 of 0

Add Files

Cancel

*Choose files to upload to your client's OpenSpace. You can select more then one file at a time. You can also drag and drop files anywhere on this page to start uploading.*

*When the files have been uploaded you will see the screen below, if the file is in PDF format you will have the option to select approval type. In red box highlighted you have two options for approval:*

*Single User - If document is uploaded to multiple users, only one requested approval is required for the document to be marked 'Approved'.*

*All Users - If document is uploaded to multiple users, all users to whom a request has been sent must approve the document before is it marked 'Approved'.*

### Upload to C2's Documents

Choose files to upload to your client's OpenSpace. You can select more than one file at a time. You can also drag and drop files anywhere on this page to start uploading.

- ☒ Client has given consent to electronically approve their documents  
☐ Do not send email notifications

**Single User** - If document is uploaded to multiple users, only one requested approval is required for the document to be marked 'Approved'.

**All Users** - If document is uploaded to multiple users, all users to whom a request has been sent must approve the document before it is marked 'Approved'.

File Name		Receive Notifications	e-Approval Type	Request e-Approval	
MultipleAgents.pdf	115.8kB	<a href="#">Edit</a>	Single User	<a href="#">Edit</a>	
ofscas.pdf	390.0kB	<a href="#">Edit</a>	All Users	<a href="#">Edit</a>	
Presenter Letter.doc	27.6kB	<a href="#">Edit</a>	None	<a href="#">Edit</a>	

[Add Files](#)

[Upload](#)

[Cancel](#)

*You also have options for who will receive notifications and who will be requested for approval.*

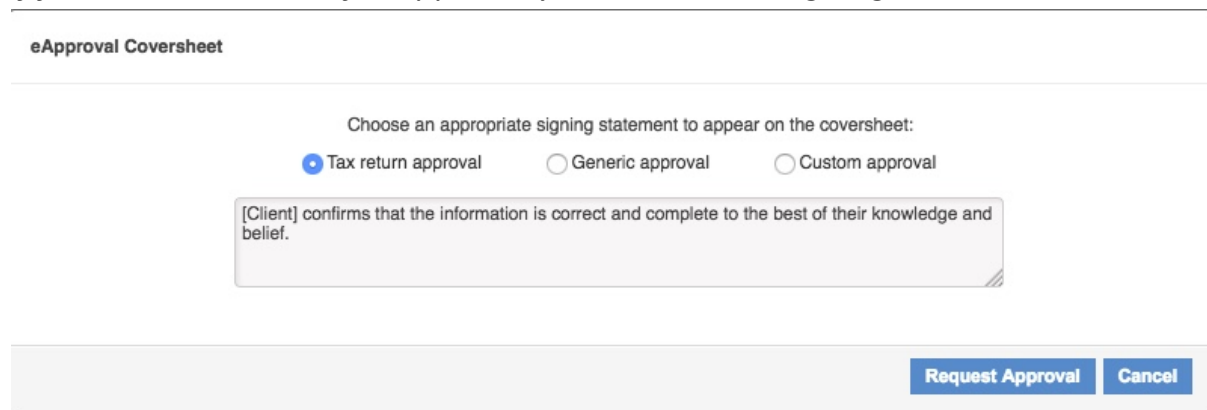
*By clicking the edit buttons it will give you a drop down so you can tick/untick.*

Receive Notifications	e-Approval Type	Request e-Approval
<a href="#">Edit</a>	Single User	<a href="#">Edit</a>
<input checked="" type="checkbox"/> Bill Preston	User	<input checked="" type="checkbox"/> Bill Preston
<input checked="" type="checkbox"/> Tom Sawyer	User	<input checked="" type="checkbox"/> Tom Sawyer
<input type="checkbox"/> Lee Taylor		<input type="checkbox"/> Lee Taylor

*When happy with the selections and files for approval, click the upload button.*

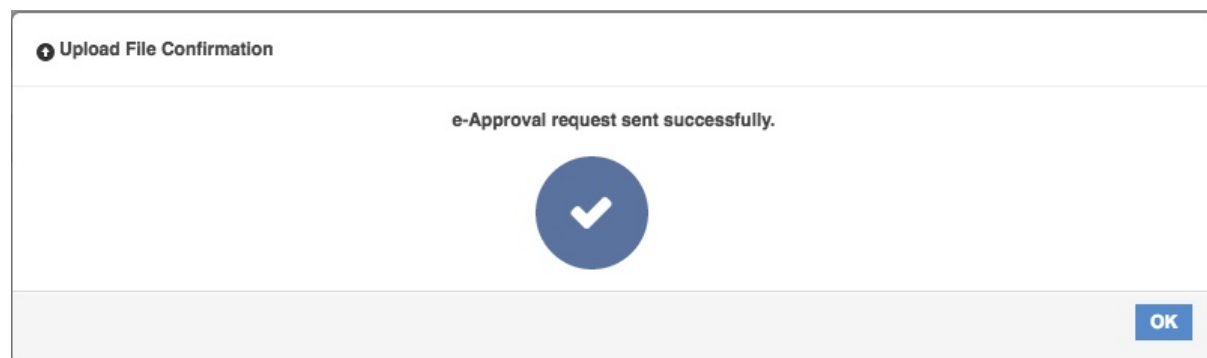


*If files have been sent for approval you will see the signing statement screen.*




The screenshot shows the 'eApproval Coversheet' interface. At the top, it says 'Choose an appropriate signing statement to appear on the coversheet:'. Below this are three radio button options: 'Tax return approval' (which is selected), 'Generic approval', and 'Custom approval'. A text box below the options contains the statement: '[Client] confirms that the information is correct and complete to the best of their knowledge and belief.' At the bottom right of the screen are two buttons: 'Request Approval' and 'Cancel'.

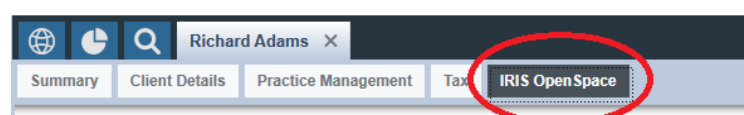
*Once you have selected the statement you want to use, click Request Approval. You will see the success screen below.*



The screenshot shows the 'Upload File Confirmation' screen. It features a large blue circle with a white checkmark in the center. Above the circle, the text reads 'e-Approval request sent successfully.' At the bottom right, there is an 'OK' button.

## Viewing Approval Status in IRIS Suite

When an item is uploaded to IRIS OpenSpace, this will show in the client dashboards facility, this can be located by clicking on the spyglass icon (). To view the OpenSpace details, choose the required client and click on the IRIS Open Space tab, as shown below.



On this page you can see which items have been uploaded, whether they have been logged into IRIS communications, their e-approval status and who they were uploaded by.

When approval is requested on documents this will show 'Approval Requested' in the eApproval Status column.

OPENSOURCE: ACCOUNTANT						
Client Status: Active						
Uploaded	Name	Description	Logged in IRIS Comms	eApproval Status	Uploaded By	Source
04/04/2017	A002-Personal tax schedules of Data-MASTER-20161115-135419-907.PDF	Personal tax schedules of Data (05/04/2016)	✓	Approval Requested	Robert	IRIS Accountancy Suite

Once the document has been approved by all required OpenSpace users this will show 'Approved' in the eApproval status column.

OPENSOURCE: ACCOUNTANT						
Client Status: Active						
Uploaded	Name	Description	Logged in IRIS Comms	eApproval Status	Uploaded By	Source
04/04/2017	A002-Personal tax schedules of Data-MASTER-20161115-135419-907.PDF	Personal tax schedules of Data (05/04/2016)	✓	Approved	Robert	IRIS Accountancy Suite

## Viewing Approval Status in OpenSpace

When the file has been requested you will see the status via the dashboard, e-Approval button and on the file itself when viewing in the client folder.

Home

Settings

Subscription

Dashboard

Clients

Files

e-Approval

e-Checklist

Location: Your Clients > C2 (3 files) > Documents

Up

Upload File

Download

New Folder

Edit Client

Notify

Edit


<input type="checkbox"/>	Name	Description	Uploaded	Latest	e-Approval
<input type="checkbox"/>	Presenter Letter.doc		28/02/2017 15:15:08		
<input type="checkbox"/>	ofscas.pdf		28/02/2017 15:15:09		Requested (28/02/17)
<input type="checkbox"/>	MultipleAgents.pdf		28/02/2017 15:15:07		Requested (28/02/17)

Click on the buttons highlighted above this will show you the e-Approval status screen see below from here you can cancel, request and amend approval.

On the screen below you can see both client users haven't approved yet, as its for All Users it will need to be approved by all client users in the list below.


**View e-Approval**

File Name: ofscaa.pdf  
Last Updated: 28/02/2017  
Required Approval: All Users  
Status: Requested



Name: Bill Preston  
Email: [ostest123456+2@gmail.com](mailto:ostest123456+2@gmail.com)  
Status: Requested

Action ▾



Name: Tom Sawyer  
Email: [ostest123456+4@gmail.com](mailto:ostest123456+4@gmail.com)  
Status: Requested

Action ▾


Amend Request

Cancel

When one client user approves the file the status will change to Pending


**View e-Approval**

File Name: ofscaa.pdf  
Last Updated: 28/02/2017  
Required Approval: All Users  
Status: Pending



Name: Bill Preston  
Email: [ostest123456+2@gmail.com](mailto:ostest123456+2@gmail.com)  
Status: Approved

IP Address: 86.154.180.44  
Timestamp: 28/02/2017 16:00 (GMT)



Name: Tom Sawyer  
Email: [ostest123456+4@gmail.com](mailto:ostest123456+4@gmail.com)  
Status: Requested

Action ▾

Amend Request



Cancel

*If a client user rejects the file you can use the action button to cancel or request approval again.*

**View e-Approval**

---

File Name: ofscaa.pdf  
Last Updated: 28/02/2017  
Required Approval: All Users  
Status: Rejected

	Name: Bill Preston Email: <a href="mailto:ostest123456+2@gmail.com">ostest123456+2@gmail.com</a> Status: Approved	IP Address: 86.154.180.44 Timestamp: 28/02/2017 16:16 (GMT)
	Name: Tom Sawyer Email: <a href="mailto:ostest123456+4@gmail.com">ostest123456+4@gmail.com</a> Status: Rejected <b>Reason</b> Rejected	<div><b>Action</b> ▾ Re-send Request Cancel Request</div>

**Amend Request** **Cancel**

*You can also amend request however this will only effect client users who haven't been sent approval.*

*For example: Lee wasn't on the original approval request so using amend you can add Lee to the approval.*

**Are you sure you want this client to approve - ofscaa.pdf?**

Request eApproval **Edit** ▾

Required Approvals

☐ Client has given consent to electronic

☒ Bill Preston  
☒ Tom Sawyer  
☒ Lee Taylor

Choose an appropriate signing statement to appear on the coversheet:

☒ Tax return approval ☐ Generic approval ☐ Custom approval

[Client] confirms that the information is correct and complete to the best of their knowledge and belief.

☐ Do not send email notifications

**Request** **Cancel**

*Once all client users have approved the file you will see the approved status*

**View e-Approval**


File Name: ofscaa.pdf

Last Updated: 28/02/2017

Required Approval: All Users

Status: Approved

Document ID: 317E083FC31DC3




Name: Bill Preston

Email: [ostest123456+2@gmail.com](mailto:ostest123456+2@gmail.com)

Status: Approved

IP Address: 86.154.180.44

Timestamp: 28/02/2017 16:25 (GMT)



Name: Tom Sawyer

Email: [ostest123456+4@gmail.com](mailto:ostest123456+4@gmail.com)

Status: Approved

IP Address: 86.154.180.44

Timestamp: 28/02/2017 16:25 (GMT)

OK

## **IRIS OpenSpace Security**

### **Overview**

*IRIS OpenSpace is hosted on the Microsoft Windows Azure platform in EU zone and therefore fully complies with UK data protection guidelines.*

*IRIS OpenSpace relies on Microsoft's security procedures to ensure physical protection of our systems.*

### **User Security**

*All user passwords are Hashed and Salted. Hashing means that IRIS OpenSpace only stores encrypted passwords and therefore it is not possible for anyone to view an actual password in the database.*

*Salting means that even in the instance of a rainbow attack is not possible to crack the encrypted password even if someone were to gain access to our user access database which is protected by Microsoft's Windows Azure built in security.*

*Only the actual user of an account sets password; not even the system administrator can set, view or change an individual user's password.*

*The only way a password can be reset is via a uniquely generated password reset link that is emailed to the user.*

### ***File Security***

*Files are encrypted in transit using Secure Socket Layer (SSL) and The Advanced Encryption Standard (AES)*